

Your estate checklist

Please complete this checklist and take it with you to your solicitor when making your will. It is a good idea to keep the checklist with a copy of your will, and let your next of kin and executors know where to find them.

Property	Financial	Money you owe	Money you are owed
Your home £.....	Bank/building society £.....	Mortgage outstanding £.....	Name and address of debtor
Your second or holiday home/caravan £.....	Stocks, shares, investments, etc £.....	Other loans £.....
Your home contents (furniture, etc) £.....	National Savings £.....	Overdrafts £.....
Antiques £.....	Pension/benefits £.....	Credit agreements £.....
Jewellery £.....	Life Assurance £.....	Credit card debts £.....
Your car £.....	Business assets £.....	Other money owed £.....
Other £.....	Other financial interests £.....		Date of loan £.....
			Amount outstanding £.....