

WILL PLANNER

Prepare for your meeting with your solicitor by completing this Will Planner and taking it along with you



the brain injury association

PERSONAL DETAILS

Your name:

Your address:

Date of Birth:

Spouse/Partner's name:

Spouse/Partner's address (if different from your own):

Date of Birth:

Children's name(s):

Children's address(es) (if different from your own):

Date of Birth(s):

Guardian's name(s):

Guardian's address(es):

People chosen by you (with their permission) to look after your children (or pets) in the event of your death.

Executor's name(s):

Executor's address(es):

Person(s) chosen by you to make your Will happen (max of 4). They can be friends, a relative or your solicitor. (Solicitors normally charge for this service)

Relationship to you:

Do you have an existing Will? You: YES/NO Your spouse or partner: YES/NO

Do you have any particular funeral wishes?

WILL PLANNER

Prepare for your meeting with your solicitor by completing this Will Planner and taking it along with you



the brain injury association

The value of your estate:

Your main assets	£	
Your home (or your share of it)		
Other property or land		
Cars & other vehicles		
Home contents inc furniture and fittings		
Items of significant value (art, jewellery etc.)		
Money in banks and building societies		
Shares, investments, National savings, Premium bonds		
Insurance and pensions		
Other savings and assets		
TOTAL ASSETS		£ (A)
Your main liabilities		
Your mortgage		
Loans and overdrafts		
Credit cards		
Credit or hire purchase agreements		
Other liabilities or debts		
TOTAL LIABILITIES		£ (B)
TOTAL ASSETS LESS LIABILITIES = ESTIMATED ESTATE VALUE		£ (A-B)

Bequests: List family members, friends and charities that you would like to see benefit from your Will and in which way e.g. money, item, share of estate

<p>Specific items/objects e.g. car, jewellery, art <i>Name & Addresses of all individuals or charities (with registered charity number)</i></p>	<p><i>Brief description of item</i></p>
<p>Pecuniary sums of money e.g. a defined/certain sum <i>Name & Addresses of all individuals or charities (with registered charity number)</i></p>	<p><i>Amount</i></p>
<p>Residuary bequests e.g. percentage/all of the remainder of your estate <i>Name & Addresses of all individuals or charities (with registered charity number)</i></p>	<p><i>Percentage</i></p>
<p>What do you want to happen to your bequests if your beneficiaries, listed above, die before you do?</p>	

A gift in your Will

At Headway, we encourage people to draw up or review their Will regularly to ensure it reflects any change in circumstances. Keeping the Will up-to-date is the only way to guarantee that your wishes will be carried out after you have gone. It also helps the family when sorting your affairs at such a distressing time.

Dying without a valid Will runs the risk of leaving your family to face a huge amount of bureaucracy. Your family home or assets may end up going to the wrong people or, in some cases, the government. Only two-thirds of people draft a Will and recent research by Saga found that a third of those surveyed said they had made no amendment to their Will since it was originally drawn up. Since then, many have had children, divorced or separated.

To help this, Headway has designed a Will Planner to enable you to work out the value of your estate - everything you own less any debts - and to give specific details of any gifts. This planner is not a Will in itself. We recommend that you take it to your solicitor when making or amending your Will to help make your discussions clearer. Armed with this information, the solicitor will be able to write a valid and correctly witnessed Will to ensure your wishes are carried out when you are no longer here. ***Please note that this planner may not be suitable for use in the Channel Islands due to the different legislation regarding probate there.***

Writing a Will also gives you an opportunity to contribute to charity and help further vital work in the future. Leaving a share of your estate after you have provided for family and friends, provides an efficient way of helping the charity continue to offer valuable services without impacting greatly on your family's position. Even a small percentage of your estate can achieve so much for the charity of your choice.

For example, leaving a gift to Headway of £500 could provide the Headway Helpline for two days. This helpline gave support to relieve the distress of 7,300 families last year. A gift of £5,000 enables us to extend our training provision to help families come to terms with the personality and lifestyle changes of a brain injury. Headway ran 62 training sessions throughout the UK last year. Alternatively a gift of £25,000 provides acute trauma support for six months. This service gave intensive support last year to over 800 families with survivors on critical care wards immediately after a brain injury.

Gifts of this kind - known as legacies or bequests - are enormously important to Headway. Without these we simply would not be able to continue to provide all the services we offer.

Those wishing to include Headway as a beneficiary in their Will can do so by quoting the charity's registration number (1025852). Confidential telephone enquiries can be made to Lorna Page, Legacy Officer, on 0115 924 0800 or via email on legacy@headway.org.uk.

"Alison spent her life helping others look and feel better. It feels right that through her legacy and Headway, we can do the same."

Joan & Ken Robins

