

# Your Will Planning Guide

We have designed this planner to help you prepare for questions your solicitor will ask at your appointment. It will help to save time and make the will writing process more efficient. If you are unsure about any of the questions, your solicitor will be happy to discuss them with you.

We hope you will consider the incredible impact that a gift in your will to the Cancer Society could have for those facing cancer. This kind of generosity means you'll always be part of something truly meaningful. We'll also welcome you to the Cancer Society Hope Fellowship so that your generous gift is acknowledged.

## 1. About you

**Full Name:** ..... **Date of Birth:** ..... / ..... / .....

**Address:** .....  
.....

**Postcode:** .....

**Telephone Number: (Home)**..... **(Mobile)** .....

**Marital Status:** Single ☐ Divorced ☐ Engaged ☐ Remarried ☐ Married ☐ Widowed ☐  
Separated ☐

## 2. Your spouse or partner

**Full Name:** ..... **Date of Birth:** ..... / ..... / .....

**Address:** .....  
.....

**Postcode:** .....

**Telephone Number: (Home)**..... **(Mobile)** .....

**Marital Status:** Single ☐ Divorced ☐ Engaged ☐ Remarried ☐ Married ☐ Widowed ☐  
Separated ☐

## 3. Children

Name	Address	DOB	Status*

\*Whether the child is from this relationship, a previous relationship or other circumstances.

#### 4. Do you have an existing will?

You: Yes ☐ No ☐ Your spouse or partner: Yes ☐ No ☐

#### 5. Nominated guardians for any child yet to reach adulthood

Full name	Address

#### 6. Do you have any particular funeral wishes?

#### 7. The value of your estate

This section helps you work out the value of your estate.

##### The value of your major assets

Your home (or your share in it)	\$ <input type="text"/>
Other property or land	\$ <input type="text"/>
Cars and other vehicles	\$ <input type="text"/>
Home contents including furniture and fittings	\$ <input type="text"/>
Items of particular value (e.g. jewellery or art)	\$ <input type="text"/>
Money in banks and building societies	\$ <input type="text"/>
Shares, investments, Kiwisaver, Premium Bonds	\$ <input type="text"/>
Insurance and pensions	\$ <input type="text"/>
Other savings and assets	\$ <input type="text"/>
<b>Total Assets</b>	\$ <input type="text"/>

##### Your major liabilities

Your mortgage	\$ <input type="text"/>
Loans and overdrafts	\$ <input type="text"/>
Credit cards	\$ <input type="text"/>
Credit or hire purchase agreements	\$ <input type="text"/>
Other liabilities	\$ <input type="text"/>
<b>Total Liabilities</b>	\$ <input type="text"/>

Assets less liabilities = estate value	\$ <input type="text"/>
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## 8. Bequests

**Specific items e.g. cars, ornaments, jewellery.** List the names and addresses of individuals and charities\* to whom you would like to make a specific gift.

Name	Address	Description

**Pecuniary bequests (set amounts of money).** List the names and addresses of individuals and charities\* to whom you would like to leave a specific sum of money.

Name	Address	Description

**Residuary bequests (a percentage or all of the remainder of your estate).** List the names and addresses of individuals and charities\* to whom you would like to leave a proportion of your estate

Name	Address	Description

\* including registered charity numbers

## 9. Choice of Executors

It is common to appoint a trusted family member or friend. A solicitor can also act as an Executor but please note there is normally a charge for this service.

Name of Executor(s) 1. ....  
2. ....

Address of Executor(s) 1. ....  
.....  
2. ....  
.....

Relationship to you 1. ....  
2. ....

Back-up executor 1. ....

**Making your will** is vital. It enables you to set down what you want to happen to your belongings and property after you are no longer here. A will is also helpful to your family and friends in the aftermath of your passing.

Writing your will is also an opportunity to make a lasting difference for a charity, furthering its cause far into the future. A share of your estate, after you have made provision for family and friends, is a particularly tidy way of helping a charity and prevents you having to decide on a precise sum.



## 10. Legal meanings

These are some of the words and terms you might encounter when making your will.

### **Administrator**

A person appointed by law to finalise your affairs if you die without leaving a will.

### **Beneficiary**

Anyone who receives something from your will.

### **Bequest (also often called a legacy)**

A gift in a will. Gifts are normally pecuniary (a specific sum of money), residuary (generally stated as a percentage share of what is left after all other gifts have been made) or specific (a particular item or property).

### **Codicil**

An addition or amendment to an existing will.

### **Estate**

The total value of everything you own at your time of death, minus any outstanding commitments.

### **Executor**

A person you appoint to make sure the wishes stated in your will are carried out.

### **Guardian**

A person appointed by a parent to look after their children in the event of their death before the children reach adulthood.

### **Intestacy**

The situation that exists if you die without a valid will.

### **Probate**

The process that determines whether your will is valid.

### **Testator**

The person making the will.

### **Trust**

A provision you can put in your will to treat part of your assets in a particular way after your death.