



The LODGE Trust Will Planner

Making a change to your will (England & Wales)

Use this form to get your wishes and information all together in one place ready to meet with your solicitor. (This is not a legal document and cannot be used as a valid will.)

Section 1. Contact Details

Your full name:

Address:

Telephone

Your partner's full name:

Address (if different from above):

Your children's full names and addresses:

If you have children under 18, who would you like to be their guardian? (Guardians have legal responsibility for children until they turn 18):

Executors' full names and addresses (Executors are the people who will deal with your estate, collecting and distributing money and property after your death. You can choose up to four executors—usually a family member or a solicitor. Write their details here and let them know where copies of your will are kept):

Section 2. Finances

List below everything that you own and everything that you owe in order to work out what your estate is worth.

Assets (what you own)	Value	Liabilities (what you	Value
Property/land	£	Loans and overdrafts	£
Cars	£	Credit cards	£
Furniture/household possessions	£	Mortgage	£
Items of high value—e.g. jewellery, antiques	£	Other debts	£
Savings	£		£
Stocks, shares, investments, premium bonds	£		£
Business assets	£		£
Insurance policies	£		£
Pensions	£		£
Any money you are owed	£		£
Other	£		£
Total assets	£	Total liabilities	£
Total assets—liabilities =		£	

Section 3. What would you like to leave to whom?

This is when you think about how you divide up your assets: you can leave specific items to people, fixed cash amounts, or a percentage share of your estate. Use the table below to put the information down, even if you're not completely sure yet.

Gifts are an essential part of the continuation of our amazing community. If you would like to leave us a gift in your will, then please use these details and pass them on to your solicitor:

The Lodge Trust CIO, Main Street, Market Overton, Rutland, LE15 7PL. Registered charity number: 1161735

Name and address	Share	Fixed amount	Specific Item
	%	£	
	%	£	
	%	£	
	%	£	
	%	£	
	%	£	
	%	£	
	%	£	

If any of the people you have put down do not survive you, what would you like to happen to their gifts?

Section 4. Funeral plans

If you would like to include any specific wishes or instructions for your funeral in your will, then write them down here.

Section 5. Questions

Write down any questions you have for the solicitor.