

Planning Your Will Worksheet

Your Will is one of the most important legal documents you can make. But it needn't be complicated. Along with the right legal advice from your solicitor, this easy-to-follow worksheet will help you to make sure that your wishes are carried out.

This worksheet is not a legally binding document. It is designed to help you plan your ideas before visiting your solicitor.

1. Make a list of your assets

In the first table below, list everything you own, and give an approximate value for each item. In the second table, list everything you owe. When you're happy you've included everything, add up the values of each list.

Item	Value
House and any other property	
Bank account(s)	
Building society account(s)	
Investments	
Stocks and shares	
Life insurance	
Premium bonds	
Any money you are owed	
Business assets	
Cars, etc.	
Furniture/household possessions	
Other assets	
Total A	

Then work out what you owe. This could include:

Item	Value
Outstanding mortgage	
Other loans	
Overdraft	
Credit card balance	
Other money owed	
Total B	

Simply take **Total B** from **Total A**. The result is the net value of what you have to leave.

Total A	
Total B	
Net value of your estate	

5. Choose a solicitor

We recommend you use a solicitor to write your Will. If you don't already have a solicitor, ask a friend or relative to recommend one. The New Zealand Law Society or your local Citizens Advice Bureau can help you find a solicitor if you don't already have one.

You can contact the New Zealand Law Society on (04) 472 7837 or <http://www.lawsociety.org.nz/>, and the Citizens Advice Bureau on 0800 367 222 or <http://www.cab.org.nz/>.

Solicitor:

6. Keep your Will safe

It's important that your Will is stored in a safe place – and that you let your executors know where it is. Your solicitor or bank can keep it for you. However, your bank may charge a small fee for this.

7. Review your Will on a regular basis

Your personal and financial circumstances may change with time, so keep your Will up-to-date.