

# A guide to planning your Will

Making your Will is a way to choose who you would like to provide for when you're no longer around. Whether that be, friends, family or a charity, including Dementia UK.

The number of people with dementia is growing all the time and by 2040, over 1.6 million people will be living with dementia. With your help, we can increase the number of dementia specialist Admiral Nurses to ensure no one faces dementia alone.

**That is why gifts in Wills are so important to Dementia UK. By generously choosing to leave a gift, you are helping us to support families far into the future.**



# Will Planner

We have put together this easy-to-use planner, to help you plan your Will. We have also included details of our free Will offers, as well as a glossary of legal terms that might crop up. **Please note, this Planner is not your Will.**

1

## Contact details

Full name:

Telephone number:

Address:

Partner's full name:

Address:

Telephone number:

Children's full name/s:

Children's address/es (if different):

2



**Guardian's full name and address** (if you are appointing a guardian to your children):

**Executors' details**

(an executor is someone you assign to carry out the instructions in your Will. This can be a friend, family member or a solicitor. Dementia UK is not able to act as an executor).



## Your estate

In this section, you can list all your assets (what you own) and liabilities (what you owe.) You can then add up your assets and subtract liabilities to work out what your estate is worth.

### Assets

Any property:	£
Cars and other vehicles:	£
Items of particular value (jewellery, art etc.):	£
Savings in banks and building societies:	£
Investments, shares, national savings, premium bonds:	£
Insurance policies:	£
Pensions:	£

### Liabilities

Loans and overdrafts:	£
Credit cards:	£
Mortgage:	£
Debts:	£

Total assets:	£
Total liabilities:	- £
Value of your estate:	= £

## Who you want to benefit from your Will

Here you can make a list of who you would like to benefit from your Will. Making a Will is the best way to ensure your savings and possessions will go to the family and friends you care about. Many people also choose to support causes and charities that are important to them.

### A gift in your Will can also reduce inheritance tax.

You can leave a percentage of your estate, a fixed cash amount or a specific item (e.g. something with sentimental value).

It is also worth thinking about what would you like to happen to any gifts left to someone who might die before you.

Name and address	% Share	Amount £	Specific items
Dementia UK, 7 <sup>th</sup> Floor, One Aldgate, London EC3N 1RE <small>Dementia UK is a registered charity in England and Wales (1039404) and Scotland (SC 047429).</small>			

A gift in your Will to Dementia UK of any amount will make a huge difference to our work and help us make sure no one faces dementia alone.

## Funeral instructions

In your Will, you can include specific instructions for your funeral or memorial service. For example, whether you want to be buried or cremated, where you want the service to be held, or what type of service you'd like. At your funeral, you may consider donations to a charity, this can be included in the instructions too.

## Notes

If you are writing your Will with a solicitor, you can use this section to jot down any questions you have for them.

Dementia UK has three free Will offers available, giving you the chance to write or update your Will either in person, online or on the phone.

Find out more by visiting [dementiauk.org/freewill](https://dementiauk.org/freewill)



## What to do once you have written your Will

### Telling family about the Will

If you feel comfortable, it would be good to let your family know where your Will is stored as it can save a lot of time and expense for them.

If you would like to let people know the contents of the Will, then you can arrange to have photocopies made.

### Updating your Will

It is important to review the contents of your Will every few years or after major life events e.g. marriage, moving house, birth of children/grandchildren.

To make changes you can use our free Will services to write a new Will

➔ [dementiauk.org/freewill](https://dementiauk.org/freewill)

### Letting us know

If you have chosen to leave a gift in your Will to Dementia UK, we would love to know so we can thank you properly. You can do so by emailing

➔ [giftsinwills@dementiauk.org](mailto:giftsinwills@dementiauk.org) or calling us on **0300 365 5500**.



## The language of Will making

**Assets:**

Everything that you own, including any shares in joint assets.

**Beneficiary:**

Anyone who is receiving something from your Will.

**Bequest/Legacy:**

A gift in a Will.

**Estate:**

Your property, money and possessions.

**Executors:**

The person/s that you appoint to carry out your instructions in the Will. This can be a friend, family member or solicitor.

**Inheritance tax:**

Tax that is paid on someone's estate after they die.

**Guardians:**

Someone you'd appoint to look after your children.

**Pecuniary gift:**

A fixed sum of money, i.e. £500.

**Probate:**

A legal process that establishes whether your Will is valid upon your death.

**Residuary gift:**

A percentage share of the value of your estate after other gifts have been made and any debts settled – many people chose this option as any amount pledged will keep its value in line with inflation.

**Specific gift:**

A specific item e.g. jewellery, heirlooms, antiques, collectibles.

**Testator (male)/Testatrix (female):**

The person who has made the Will.

**Trust:**

An arrangement that you can make in your Will to administer some of your assets after your death.

If you have any questions, please do get in touch,  
we'd love to hear from you.



[giftsinwills@dementiauk.org](mailto:giftsinwills@dementiauk.org)



0300 365 5500