



St Joseph's  
Hospice

Compassionate Community Care since 1905

Advocacy | Compassion | Justice | Quality | Respect

# Will Planner

# Will planner

A great way to prepare if you're thinking of making or updating your Will. Don't worry about any sections that you're unable to complete as you can discuss these with your solicitor or legal expert.

At the end of the planner, you'll find some definitions of some words that you might come across when putting your affairs in order. We've also provided you with some suggested wording, if you're thinking of including a gift in your Will to St Joseph's Hospice.

We hope you find the booklet useful.

## About you

Full name: \_\_\_\_\_

Address: \_\_\_\_\_

Post Code: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Telephone number (home & mobile): \_\_\_\_\_

Marital status: \_\_\_\_\_

Do you have an existing Will?  Yes  No

## About your spouse, partner or civil partner

Full name: \_\_\_\_\_

Address: \_\_\_\_\_

Post Code: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Telephone number (home & mobile): \_\_\_\_\_

Marital status: \_\_\_\_\_

Do they have an existing Will?  Yes  No

## Your children

| Full Name | DoB | Address |
|-----------|-----|---------|
|           |     |         |
|           |     |         |
|           |     |         |
|           |     |         |

## Nominated guardians (for children under 18 years)

| Full Name | Address |
|-----------|---------|
|           |         |
|           |         |
|           |         |
|           |         |

# Your funeral wishes

|  |  |
|--|--|
| <p>You may state in your Will if you wish to be buried or cremated.</p>  |  |
| <p><b>If you are a Catholic or Christian, you can add the following details. Otherwise please adapt the section to match your belief or funeral preferences:</b></p>   | <p>I would like my funeral service to be (please choose one): <input type="checkbox"/> <b>Mass</b> or <input type="checkbox"/> <b>Liturgy</b> of the word (a service of readings and prayers only)</p> |
| <p>Scripture passages or quotes that I'd like at my service:</p>   | <p>1. _____<br/>         _____</p> <p>2. _____<br/>         _____</p> <p>3. _____<br/>         _____</p>   |
| <p>Hymns/songs that I'd like my friends and family to sing</p>   | <p>1. _____<br/>         _____</p> <p>2. _____<br/>         _____</p> <p>3. _____<br/>         _____</p>   |
| <p>Do you wish to have flower tributes, and/or donations to support a charity?</p> <p><b>Please specify whether you'd like Flowers/Donations/Both/Neither</b></p>  |  |
| <p>If you'd like donations made in lieu of flowers, please specify which charity you'd like to support in this special way.</p> <p><b>Please remember St Joseph's Hospice, registered charity number 1113125</b></p> |  |

# Value of your Estate

## What you own (your assets)

| Description                                       | Value |
|---|-------|
| Your home (or your share in it)                   | £     |
| Other property or land (here or abroad)           | £     |
| Car and other vehicles                            | £     |
| Home contents including furniture and fittings    | £     |
| Items of particular value (e.g. jewellery or art) | £     |
| Money in banks and building societies             | £     |
| Shares/Investments/ Premium Bonds                 | £     |
| Insurance and pensions                            | £     |
| Other savings and assets                          | £     |
| <b>Total assets</b>                               | £     |

## What you owe

### (Your debts/liabilities)

| Description                    | Value |
|--------------------------------|-------|
| Mortgage or Rent               | £     |
| Loans & Overdrafts             | £     |
| Credit cards                   | £     |
| Higher purchase agreements     | £     |
| Other liabilities              | £     |
| <b>Total debts/liabilities</b> | £     |

# Your bequests

(gifts in your Will)

**Specific items:** List the names and addresses of individuals or charities (including registered charity numbers) to whom you'd like to make a specific gift such as house, car or jewellery.

| Name | Address | Item description |
|------|---------|------------------|
|      |         |                  |
|      |         |                  |
|      |         |                  |
|      |         |                  |
|      |         |                  |
|      |         |                  |
|      |         |                  |
|      |         |                  |
|      |         |                  |

**Residuary bequests (share of your estate):** List the names and addresses of individuals or charities (including registered charity numbers) to whom you'd like to leave a proportion of your estate.

| Name | Address | Percentage |
|------|---------|------------|
|      |         |            |
|      |         |            |
|      |         |            |
|      |         |            |
|      |         |            |
|      |         |            |
|      |         |            |
|      |         |            |
|      |         |            |

**Pecuniary bequests (cash gift):** List the names and addresses of individuals or charities (including registered charity numbers) to whom you'd like to leave a specific sum of money.

| Name | Address | Amount |
|------|---------|--------|
|      |         |        |
|      |         |        |
|      |         |        |
|      |         |        |
|      |         |        |
|      |         |        |
|      |         |        |
|      |         |        |
|      |         |        |

## Your chosen Executors

| Full Name | Address |
|-----------|---------|
|           |         |
|           |         |
|           |         |
|           |         |
|           |         |
|           |         |
|           |         |
|           |         |
|           |         |

# Suggested Wording

(if you wish to include a gift to St Joseph's Hospice in your Will)

## Specific gift - such as property, car or painting

I give to St Joseph's Hospice, Mare Street, London, E8 4SA (registered charity number 1113125) my **<insert the item or items for example my home, located at \_\_\_\_\_ or describe the item in detail and any serial numbers ...my original painting called \_\_\_\_\_, by \_\_\_\_\_ measuring \_\_\_\_\_ >** for its general charitable purposes. I direct that the receipt of the Treasurer or duly authorised officer of St Joseph's Hospice shall be a valid and appropriate form of discharge.

## Residuary gift – a percentage of your estate

I give to St Joseph's Hospice, Mare Street, London, E8 4SA (registered charity number 1113125) **<insert the percentage or part of your estate that you wish to gift, e.g. the whole (100%), half (50%) or quarter (25%)>** for its general charitable purposes. I direct that the receipt of the Treasurer or duly authorised officer of St Joseph's Hospice shall be a valid and appropriate form of discharge.

## Pecuniary gift – a specific amount of money

I give to St Joseph's Hospice, Mare Street, London, E8 4SA (registered charity number 1113125), the sum of **£<insert the amount in figures and in words>** for its general charitable purposes. I direct that the receipt of the Treasurer or duly authorised officer of St Joseph's Hospice shall be a valid and appropriate form of discharge.

# Glossary of words

|                              |  |
|------------------------------|--|
| <b>Assets</b>                | everything that you own, including your share in assets held jointly with someone else.  |
| <b>Liabilities</b>           | any money that you owe or bills that must be paid from your estate.  |
| <b>Estate</b>                | your property, money and possessions.  |
| <b>Testator/Testatrix</b>    | the person who's having their Will written.  |
| <b>Intestacy</b>             | where someone dies without leaving a Will. There are then legal rules governing who can deal with your estate and who benefits from it.  |
| <b>Guardians</b>             | the people you choose and name in your Will to look after your children (who are under 18) in the event of your death.   |
| <b>Legacy or Bequest</b>     | a gift you leave in your Will to an individual or causes close to your heart.  |
| <b>Beneficiary</b>           | a person or charity who will receive a gift in your Will.  |
| <b>Specific legacy</b>       | a specific item, such as a house, car or jewellery.  |
| <b>Residuary legacy</b>      | also known as a share of an estate, which is a percentage of everything you own after any pecuniary legacies, specific legacies, debts and legal fees have been paid out.  |
| <b>Pecuniary legacy</b>      | also known as a cash gift, which is a set sum of money.  |
| <b>Codicil</b>               | a legal document used to make an amendment or addition to your existing Will.  |
| <b>Executor</b>              | Someone you choose and name in your Will to deal with your affairs (administer your estate) in accordance with your Will, after your death.  |
| <b>Probate</b>               | the first thing that your next of kin or Executor named in your Will have to do before they can claim, transfer, sell or distribute any of your assets, after your death. If you die without a Will, the law will determine who should receive everything.   |
| <b>Grant of Probate</b>      | a document which confirms that probate has been granted and gives your next of kin or Executor the authority to start dealing with your assets in accordance with your Will.   |
| <b>Inheritance Tax (IHT)</b> | a tax on the estate of someone who's died. There's normally no IHT to pay if the value of your estate is under £325,000 and/ or you leave everything to your spouse, civil partner, charity or a community amateur sports club. For more information about IHT, please visit <a href="http://www.gov.uk/inheritance-tax">www.gov.uk/inheritance-tax</a> .  |
| <b>Trusts</b>                | a legal arrangement that allows your assets such as property to be looked after by a third party, known as a Trustee, to ensure your possessions only go to those whom you'd want to inherit your estate. Trusts can be arranged in many ways and can specify exactly how and when your assets are passed on to your beneficiaries. Assets in a trust may also be able to pass outside of probate, saving time, court fees, and potentially reducing estate taxes as well. |





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**St Joseph's  
Hospice**

Founded in 1905 under the care of the Religious Sisters of Charity. Charity No. 1113125