



Making Your Will

A Will-writing worksheet to help you plan your ideas before visiting your solicitor. This worksheet is not legally binding in any way



There are three main ways that you can leave a gift in your Will:

- **A share of your estate (residuary legacy)**
- **A specific sum (pecuniary legacy)**
- **A specific item**

Remembering Safe Haven for Donkeys in the Holy Land

Legacy gifts are a vital source of funding if Safe Haven for Donkeys in the Holy Land is to continue reaching out to donkeys, mules and horses in desperate need in Israel and Palestine. If you choose to include Safe Haven for Donkeys in the Holy Land in your Will, please ask your solicitor to use one of the following suggested texts:

For a share of your estate: I give all/a share of (please state fraction/percentage) of the residue of my estate absolutely to Safe Haven for Donkeys in the Holy Land (registered charity number 1083468) of Unit 23, More House Farm Business Centre, Ditchling Road, Wivelsfield Haywards Heath, West Sussex, RH17 7RE, to be applied by Safe Haven for Donkeys in the Holy Land for its charitable purposes. I further direct that the receipt of the UK Operations Director or any other proper officer of Safe Haven for Donkeys in the Holy Land for the time being shall be sufficient discharge to my executors.

For a specific sum: I give to Safe Haven for Donkeys in the Holy Land (registered charity number 1083468) of Unit 23, More House Farm Business Centre, Ditchling Road, Wivelsfield Haywards Heath, West Sussex, RH17 7RE, absolutely, (write in here the sum you wish to give) to be applied by Safe Haven for Donkeys in the Holy Land for its charitable purposes. I further direct that the receipt of the UK Operations Director or any other proper officer of Safe Haven for Donkeys in the Holy Land for the time being shall be sufficient discharge to my executors.

For a specific item: I give to Safe Haven for Donkeys in the Holy Land (registered charity number 1083468) of Unit 23, More House Farm Business Centre, Ditchling Road, Wivelsfield Haywards Heath, West Sussex, RH17 7RE, absolutely, (write in here whatever you wish to give) to be applied by Safe Haven for Donkeys in the Holy Land for its charitable purposes. I further direct that the receipt of the UK Operations Director or any other proper officer of Safe Haven for Donkeys in the Holy Land for the time being shall be sufficient discharge to my executors.

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

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:

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 TOTAL VALUE OF YOUR ESTATE	

3. Your executors – the people who will make it happen

You can have up to four executors. These could be friends, family or a professional such as your solicitor. Whoever you choose, make sure you ask their permission. Make a note of your executors below.

EXECUTORS

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4. For parents: appointing guardians

If you have children, this is probably one of your major motivations for writing a Will in the first place. Discuss your wishes with the people you appoint to make sure they agree. Again, note down their names and address in the space below.

GUARDIANS

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5. Choose a solicitor

We recommend you use a solicitor to write your Will.

SOLICITOR

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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, they may charge a 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.

Glossary

Estate	The property, including money, owned by the Deceased, after any debts and/or expenses connected with his/her death have been taken into account.
Beneficiaries	People or organisations – for example a charity – that benefit from a Will.
Testator	The person who makes a Will.
Executor(s)	Person(s) appointed in a Will by the testator to deal with the estate after his/her death.
Guardian(s)	The person(s) appointed in a Will by the testator to look after his/her children, if there is no-one else with parental responsibility to do so.
Residuary legacy	A share of the estate (ie a percentage) allocated in the Will by the testator.
Pecuniary legacy	A gift of money (ie where the precise value is specifically indicated) stated in a Will.
Contingent legacy	A gift that is dependent on an event that may or may not happen. For example, if a testator outlives an intended beneficiary, a gift might pass instead to a nominated charity.