



World  
Cancer  
Research  
Fund



# Your simple will planner

The easy way to rewrite the  
future – and help prevent cancer  
for generations to come.

# Getting started...

**Your will is your opportunity to control the future of your money and your possessions. In this way, you can make sure they are passed on in the way that YOU want. The information and worksheets below will help you plan out your wishes.**

Before meeting with your solicitor or professional will writer you should:

## **Make a list of everything you own.**

Please find enclosed a checklist to help you do this.

## **Choose who you want to include in your will.**

Gifts can be anything you own, cash amounts or a percentage of your estate.

## **Have any essential information to hand.**

This may include details of any property or land, life insurance, shares, pension details, bank or building society accounts and passwords for any electronic assets you have like Paypal, iTunes or online banking.

## **Think about Inheritance Tax.**

Including a gift to charity in your will can be an effective way to reduce inheritance tax.

**Please do take a little time to work through this guide. It will help you to gather your thoughts before meeting your will writer.**

## **Decide who your executors, trustees and guardians should be.**

Executors are people responsible for gathering assets and liabilities of your estate and distributing money from your will. Trustees are needed if your will creates a trust. Guardians are necessary for any children under 18. Of course, all of these should be people who you have complete faith and trust in.

## **Consider making residuary gifts to your chosen charities.**

Residuary gifts (a % of your estate) are taken after pecuniary gifts (specific sums of money) have been made, so they're good to give to charities because they don't reduce the specific value of any pecuniary gifts you leave to family and friends.



# Your easy will planner

You can prepare for writing your will by printing off and completing this simple checklist, or by making a note from this of all the things you need to consider before starting your will.

**Your name and address**

**Your partner's name and address**

**Your executors' full names and addresses**

**Children's full names and addresses**

**Guardians' full names and addresses**

# How to work out the value of your estate

Using this table you can make a list of everything you own and its approximate value. In the first section, you can work out the value of your assets (what you own); in the second section, your liabilities (what you owe). By deducting your liabilities from your assets, you can discover the value of your estate.

<b>What is the value of your major assets?</b>	<b>£</b>
Your home	
Other property and land	
Cars and other vehicles	
Home contents including furniture and fittings	
Items of particular value	
Money in banks and building societies	
Shares, investments, national savings, premium bonds	
Insurance and pensions	
Other savings and assets	
<b>Total assets</b>	

<b>What are your major liabilities?</b>	<b>£</b>
Your mortgage	
Loans and overdrafts	
Your credit cards	
Credit or HP agreements	
Other liabilities	
<b>Total liabilities</b>	

<b>Total assets minus total liabilities equals your total estate value</b>	<b>£</b>
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# Choose who you'd like to provide for

With this table, you can begin to make a list of the family, friends and charities that you would like to provide for in your will, and think about what you would like to give them, whether it's a specific item, an amount of money or a share of your estate.

Name and address	Specific item	Amount £	% share

# Make notes of any questions

**You may have more questions now than when you started filling in the worksheet!  
If so, why not jot these down so you can discuss them with your will writer?**

Questions to be discussed:

**You or your will writer can contact our Legacy Team on 020 7343 4200  
or email [giftsinwills@wcrf.org](mailto:giftsinwills@wcrf.org) if you would like more assistance.**



**If you'd like to include a gift to us in your will to help give future generations the power to prevent cancer, here are the details that you need to include in your will:**

**Our name:** World Cancer Research Fund

**Our charity number:** 1000739

**Our full address:** 140 Pentonville Road, London, N1 9FW

Please ensure that you get our name word perfect – otherwise you may end up making a gift to another charity entirely!

You can contact our legacy team on **020 7343 4200** or email **[giftsinwills@wcrf.org](mailto:giftsinwills@wcrf.org)** if you would like more assistance. **Thank you.**

World Cancer Research Fund  
140 Pentonville Road, London N1 9FW

Registered with the Charity Commission in  
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