YOUR GUIDE FOR PLANNING YOUR WILL

We recommend you speak to your solicitor when it comes to writing your Will, however you might find it helpful to prepare and think about the following areas first.

We've included some suggested areas below and some example wording over the page.

1. Your personal details

Title: ........................................................ ................................................................................................

Address: ........................................................................................................................................

........................................................................................

Postcode: .............................................

Telephone: ................................................. Mobile: .................................................................

Email: ........................................................ Date of birth: .........................................................

2. Executors

It's important to appoint two appropriate Executors to ensure your wishes are carried out according to your Will. This may include your solicitor, or a friend or family member.

Executor 1

Name: ........................................................

Address: .....................................................

....................................................................

Executor 2

Name: ........................................................

Address: .....................................................

........................................................................................

3. Validation

<table>
<thead>
<tr>
<th>Assets</th>
<th>Liabilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property £</td>
<td>Mortgage remaining £</td>
</tr>
<tr>
<td>House contents £</td>
<td>Loans £</td>
</tr>
<tr>
<td>Vehicles £</td>
<td>Overdraft £</td>
</tr>
<tr>
<td>Valuables £</td>
<td>Other £</td>
</tr>
<tr>
<td>Bank accounts £</td>
<td></td>
</tr>
<tr>
<td>Shares £</td>
<td></td>
</tr>
<tr>
<td>Pensions £</td>
<td></td>
</tr>
<tr>
<td>Life insurance £</td>
<td></td>
</tr>
<tr>
<td>Savings £</td>
<td></td>
</tr>
<tr>
<td>Other £</td>
<td></td>
</tr>
<tr>
<td>Total £</td>
<td>Total £</td>
</tr>
</tbody>
</table>

Total assets less total liabilities £
Suggested Will Wordings

You can use the below wording, depending on which type of gift you would like to leave:

1. Pecuniary gift
   “I direct my Executor to pay the sum of £…………. to” [please include sum here]

or

2. Specific gift
   “I direct my Executor to make over ……………. to” [include specific items here]

or

3. Whole of Residue Gift
   “I bequeath the residue of my estate to”

Followed by,

“the Scottish Society for the Prevention of Cruelty to Animals, Kingseat Road, Halbeath, Dunfermline KY11 8RY (Scottish Charity number SC006467).

And I direct that (1) if the Scottish Society for the Prevention of Cruelty to Animals has changed its name or has been amalgamated with or transferred its assets to any other body or has been wrongly designed then my Executors shall give effect to this bequest as if it had been made to such other body with similar purposes to the legatee as my Executors may in their sole discretion decide, and (2) the receipt of an authorised official of any such body shall be a full and sufficient discharge to my Executors.”

4. Part of Residue Gift
   “I direct my Executors to divide the whole residue of my means and estate into [number] parts and to pay, convey and make over those parts as follows: (a) (number of) part(s) to the Scottish Society for the Prevention of Cruelty to Animals, Kingseat Road, Halbeath, Dunfermline KY11 8RY (Scottish Charity number SC006467) for its charitable purposes; (b) (c) etc. [here insert the number of parts which they are to receive and the names and addresses of the other charities/beneficiaries who are to receive a share of the residue]; And I direct that (1) inheritance tax in respect of non-exempt parts of the residue shall be borne by those parts only, (2) if any charity has changed its name or has been amalgamated with or transferred its assets to any other body or has been wrongly designed then my Executors shall give effect to such legacy as if it had been made to such other body with similar purposes to the legatee as my Executors may in their sole discretion decide, and (3) the receipt of an authorised official of any such body shall be a full and sufficient discharge to my Executors.”

Remember

- This document doesn't constitute a valid Will. If you wish to write or change a Will you should always consult a solicitor who can keep you right.
- Do-it-Yourself Wills are not recommended as your wishes may be misinterpreted or your Will may not be signed and witnessed properly.
- A properly drafted Will can, in some cases, reduce the amount of inheritance tax which may have to be paid.

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