

Shelter

Valuing your assets

First work out what you own:

	Estimated value
House	
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 possessions	
Other assets	
Total A	£

Then work out what you owe. This could include:

	Value
Outstanding mortgage	
Other loans	
Overdraft	
Credit card balance(s)	
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	= £

Then decide who you want to benefit:

People or organisations you want to benefit	Share of estate	Specific Sum	Specific Item

Finally, decide who you want to be your executor(s), and, if you have any children under 18 years of age who should be their guardian(s).

	Executor One	Executor Two
Name		
Address		
Postcode		
Contact Tel. No.		
Guardian(s)		
Name		
Address		
Postcode		
Contact Tel. No.		