

Estate Check List

By completing this check list, it will help you to have an idea of the value of your estate.
This can assist you when you are discussing your Will with your Solicitor or Will Writer.

Assets

| | |
|--|----------|
| Home | £ |
| Other property | £ |
| Household contents (insurance value) | £ |
| Valuables (insurance value) | £ |
| Furniture/ antiques (insurance value) | £ |
| Jewellery (insurance value) | £ |
| Car(s) (resale value) | £ |
| Savings and cash (including bank and building society accounts) | £ |
| Stocks and shares (market value) | £ |
| Other investments | £ |
| Pension benefits | £ |
| Life insurance (if you died now) | £ |
| Any other investments | £ |
| Any other assets | £ |
| TOTAL ASSETS | £ |

Liabilities

| | |
|---------------------------------|----------|
| Mortgage | £ |
| Bank and building society loans | £ |
| Hire purchase agreements | £ |
| Bank overdrafts | £ |
| Credit card | £ |
| Tax owed | £ |
| Any other bills | £ |
| TOTAL LIABILITES | £ |

Value of your Estate

(total assets minus total liabilities):

£ _____

**Thank you
for supporting**

Hospice at Home
Carlisle and North Lakeland
Local Care for Local People

Valley Court, Barras Lane, Dalston, Cumbria, CA5 7NY
Tel. 01228 475025
Website: www.hospiceathome.co.uk
Email: admin@hospiceathome.co.uk
Registered as a charity in England and Wales (1095708)



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