

My Will Planner



Catholic Diocese of
PORTSMOUTH



What is a Will Planner?

This planner is a great way to prepare if you are thinking of making or updating your Will. Do not worry if there are any sections you are unable to complete as you can discuss this with your solicitor or legal expert.

On the following page you will find a glossary with useful words and their definitions that you may come across when putting all your documents in order. The Catholic Diocese of Portsmouth has also provided you with some suggested wording in this booklet if you wish to include a gift in your Will to your local parish, to the Clergy, or to the Catholic Diocese of Portsmouth.

We hope you find this useful.

Also available:

- **Instructions for my Catholic Funeral**
- **Estate Planning – Asset Inventory Booklet**
- **Guidelines for Funerals and Care of the Terminally Ill**

Download at: <https://portsmouthdiocese.org.uk/legacy>

or scan the QR code



Glossary of words

Assets – everything that you own, including your share in assets held jointly with someone else.

Liabilities – any money that you owe or bills that must be paid from your estate.

Estate – your property, money and possessions.

Testator/Testatrix – the person who is having their Will written.

Intestacy – where someone dies without leaving a Will. There are then legal rules governing who can deal with your estate and who benefits from it.

Guardians – the people you choose and name in your Will to look after your children (who are under 18) in the event of your death.

Legacy or Bequest – a gift you leave in your Will to an individual or causes close to your heart.

Beneficiary – a person or charity who will receive a gift in your Will.

Specific Legacy – a specific item, such as a house, car or jewellery.

Residuary Legacy – also known as share of an estate, which is a percentage of everything you own after any pecuniary legacies, specific legacies, debts and legal fees have been paid out.

Pecuniary legacy – also known as a cash gift, which is a set of money.

Codicil – a legal document used to make an amendment or addition to your existing Will.

Executor – Someone you choose and name in your Will to deal with your affairs (administer your estate) in accordance with your Will, after your death.

Probate – the first thing that your next of kin or Executor named in your Will have to do before they can claim, transfer, sell or distribute any of your assets, after your death. If you die without a Will, the law will determine who should receive everything.

Grant of Probate – a document which confirms that probate has been granted and gives your next of kin or Executor the authority to start dealing with your assets in accordance with your Will.

Inheritance Tax (IHT) – a tax on the estate of someone who's died. There's normally no IHT to pay if the value of your estate is under £325,000* and/or you leave everything to your spouse, civil partner, charity or a community amateur sports club.

Trusts – a legal arrangement that allows your assets such as property to be looked after by a third party, known as a Trustee, to ensure your possessions only go to those whom you'd want to inherit your estate. Trusts can be arranged in many ways and can specify exactly how and when your assets are passed on to your beneficiaries. Assets in a trust may also be able to pass outside of probate, saving time, court fees and potentially reducing estate taxes as well.

* IHT amount is as of January 2026

About you

Full name:

Address:

Postcode:

Date of Birth:

Telephone number (home):

Mobile number:

Marital Status:

Do you have an existing Will?

Yes

No

About your spouse

Full name:

Address:

Postcode:

Date of Birth:

Telephone number (home):

Mobile number:

Marital Status:

Do you have an existing Will?

Yes

No

Your Children

Full Name	Date of Birth	Address

Nominated guardians (for children under 18 years old)

Full Name	Address

Value of your Estate

(What you own/your assets)

Description	Value
Your home (or your share in it)	£
Other property or land (here or abroad)	£
Car and other vehicles	£
Home and contents including furniture and fittings	£
Items of particular value (e.g. jewellery or art)	£
Money in banks and building societies	£
Shares/Investments/Premium bonds	£
Insurance and pensions	£
Other savings and assets	£
Total Assets	£

What you owe

(Your debts/liabilities)

Description	Value
Mortgage or Rent	£
Loans & Overdrafts	£
Credit cards	£
Higher purchase agreements	£
Other liabilities	£
Total debts/liabilities	£

Pecuniary bequests (a specific sum of money): List the names and addresses of individuals or charities (including registered charity numbers) to whom you'd like to leave a specific sum of money.

Name	Address	Amount

Your chosen Executors

Name	Address

You may appoint your partner as Executor. You may appoint two people to be Executors. You should name another person if the preferred Executor is deceased or unable to act at the time. You can appoint anybody with whom you have a relationship and you trust. You should inform them and obtain their willingness to perform.

Types of gifts and wording

You can leave a gift to the diocese, a parish or a specific cause like our seminarians or our retired priests.

Getting the Wording Right

It is always best to seek proper legal advice from a qualified solicitor when drawing up your will or changing your existing will. Below are examples of wording for the different types of gifts which can be left in a Will. As each parish is part of the single charity which is the Catholic Diocese of Portsmouth (1199568), it is wise to refer to that charity number in your will. This is to ensure that your gift goes to the correct place.

Pecuniary Gift – a specific set sum of money.

I give to the Catholic Diocese of Portsmouth, Registered Charity Number **1199568**, based at Diocesan Office, St Edmund's House, Bishop Crispian Way, Portsmouth PO1 3QA, the sum of £_____ to meet the ongoing needs of the Diocese.

Residuary Gift – also known as a share of an estate, is a percentage of everything

I give to the Catholic Diocese of Portsmouth, Registered Charity Number **1199568**, based at Diocesan Office, St Edmund's House, Bishop Crispian Way, Portsmouth PO1 3QA, _____% of my estate (after all debts, legacies, Inheritance Tax and administration costs have been paid) to be to meet the ongoing needs of the parish.

Specific Gift – is a particular item, such as a house, car, jewellery or painting you own after any cash gifts, specific gifts, debts, funeral expenses and legal fees have been paid.

I give to the Catholic Diocese of Portsmouth, Registered Charity Number **1199568**, based at Diocesan Office, St Edmund's House, Bishop Crispian Way, Portsmouth PO1 3QA, stocks/shares/property/chattels to be used to meet the ongoing needs of the Parish.

Whichever form of gift is chosen, the following clause should also be added, as sometimes charities merge or change their legal status and charity number:

If, at my death, the charity named above (Original Charity) no longer exists or is being wound up, my Trustees must:

(a) if the Original Charity has merged, or is about to merge, with another charity (Recipient Charity) and the merger, when completed, is registered in the official register of mergers maintained by the Charity Commission, pay the Recipient Charity the amount specified above as being payable to the Original Charity; or

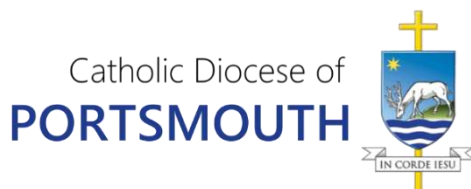
(b) if clause (a) above does not apply, pay the amount specified above as being payable to the Original Charity to another charity that has objects similar to the Original Charity.

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