



Supporting families affected by primary and secondary immunodeficiency

Guidance for making a will

Make sure your loved ones are provided for

Before you visit your solicitor, make sure you've done a little preparation. This can save you time and money in solicitor's fees.

Start by estimating the value of your estate

Draw up a list of what you own and what it is likely to be worth. If your estate is worth more than a certain amount, then it could be liable for inheritance tax. A gift to charity is exempt from this tax, reducing your liability.

Decide whom to include

Make a list of who you want to benefit from your estate, and in what way.

Find a solicitor

If you don't have a solicitor, then you could ask your friends or family to recommend one. Alternatively, you can contact the Law Society for the name of a solicitor in your area: <http://solicitors.lawsociety.org.uk>

Take essential information with you

To save time (and money) when you visit a solicitor, take an up-to-date list of your assets and liabilities, as well as the names and addresses of everyone you want to benefit from your will.

Appoint your executors

You can appoint between one and four executors to be responsible for carrying out your wishes. These can be family members, friends and/or a solicitor. Keep your will safe and make sure your executors know where to find it.

Get your will signed and witnessed

When your will is drawn up it will need to be signed by you in the presence of two witnesses. These cannot be people who will benefit from your will or who are married to beneficiaries.

Keep your will up to date

Your circumstances may change over time. Review your will every few years to ensure it still reflects your wishes.