

# SPCA WILL PLANNER

We've included this planning sheet to help you prepare should you decide to talk to your legal adviser about making or updating a Will.

Please note this document **DOES NOT CONSTITUTE** a valid Will.

## 1. Personal Details

Your Full Name:	
Address:	
Postcode:	
Your Partner/Spouse's Full Name:	
Address:	
Postcode:	
Executor's Full Name(s):	
Address:	
Your Children's Full Names:	
DOB:	
Address:	
Legal Guardian's Full Name(s):	
Address:	

## 2. The Value of your Estate

Here you can write down estimates of the value of your assets and debts. The value of your estate – which you can leave to family, friends or charity – is simply your total assets minus your total debts.

### Assets

Property(ies) Address: Home & any other property	\$
Car(s) Make/Model (inc Motorbikes, Caravans & Motorhomes)	\$
Furniture	\$
Household effects (Kitchenware, TV etc)	\$
Personal effects (Jewellery, Clothes, Shoes etc)	\$
Items of Particular Value (eg Jewellery/Painting/Any collections)	\$
Bank Accounts (Inc Saving & Cheque) / Term Deposits	\$
Shares / Investments	\$
Life Insurance Policies*	\$
Pensions (NZ and Overseas)	\$
Kiwisaver	\$
Foreign/Overseas Assets	\$
Other	\$
<b>TOTAL</b>	<b>\$</b>

\*If you have already nominated a beneficiary for your life insurance policy, these will sit outside of your estate and are not included within the Will.

### Debts

Mortgage(s)	\$
Funeral Expenses (N/A if you have a Funeral Trust set up)	\$
Loans and Credit Cards	\$
Other Debts	\$
<b>TOTAL</b>	<b>\$</b>

### Value of your Estate

<b>Total Assets Minus any Debts</b>	<b>\$</b>
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### 3. The People and Causes you want to benefit

Use this section to think about the people and/or charities you care about most and want to leave gifts to in your Will. Think about whether you want to leave a specific item(s) or amount(s) of money, or a percentage of your estate. Please note that if you are including a gift to charity you will need to include the Charities Commission number.

Name:		Share (%)	
Address:		Amount \$	
		Specific Item(s)	
Name:		Share (%)	
Address:		Amount \$	
		Specific Item(s)	
Name:		Share (%)	
Address:		Amount \$	
		Specific Item(s)	
Name:		Share (%)	
Address:		Amount \$	
		Specific Item(s)	
Name:		Share (%)	
Address:		Amount \$	
		Specific Item(s)	
Name:		Share (%)	
Address:		Amount \$	
		Specific Item(s)	

#### 4. Special Instructions (Levels 2 & 3 for Residue)

Use this section to include any special instructions you may have – *such as what you would like to happen to your estate if one or more of your beneficiaries passes away (with you, or before or after you).*

#### 5. Your Pet(s)

Use this section to think about who might take any pets you have at the time of your death. We highly recommend you consider family and friends first, as your pet(s) will also have a bond and relationship with them. Otherwise, you can consider SPCA's Pet Legacy Plan, please email [givinghearts@spca.nz](mailto:givinghearts@spca.nz) for more details

Once you have completed this Will planner, you can take it to your legal adviser, or look online to complete your Will.

## LEAVING A LEGACY

The SPCA help animals across New Zealand. Charities Commission number CC64075.

The SPCA only exists with the wonderful support of public donations.

SPCA is proud to partner with Footprint's, New Zealand's leading online Will providers, to offer **FREE** Wills to our dedicated supporters.

[https://partners.myfootprint.co.nz/spca?utm\\_source=website&utm\\_medium=link&utm\\_campaign=spca](https://partners.myfootprint.co.nz/spca?utm_source=website&utm_medium=link&utm_campaign=spca)

