OpenWill

Your UK will planning checklist

Gather the decisions and details you need before drafting a will. Free to print and use — no account needed. This checklist is not a will or legal advice.

01 Know which rules apply

- [ ] Note whether your will needs guidance for England and Wales, Scotland or Northern Ireland. Rules are not identical across the UK.
- [ ] Write down your full name, address and any former names. Keep sensitive information private; do not list passwords or full account numbers here.
- [ ] Flag anything needing professional advice: overseas property, a business, trusts, dependants needing care, or a blended family.

02 List what matters

- [ ] List property, savings, investments, personal possessions and digital assets. Note joint ownership and liabilities.
- [ ] Check how jointly owned assets, pensions and life insurance pass on; not everything is distributed by a will.
- [ ] Name intended recipients for specific gifts and the rest of your estate. Consider alternatives if a recipient dies before you.

03 Choose your people

- [ ] Ask suitable executors whether they are willing to act. Record contact details and consider replacement executors.
- [ ] If you have children under 18, discuss a proposed guardian and get advice about the appointment and your family circumstances.
- [ ] Identify independent witnesses appropriate to your jurisdiction. Do not choose a beneficiary or their spouse or civil partner.

Notes / questions for a solicitor:

Sign, store and keep it current

A finished will needs more than completed boxes. Use this page to plan the next steps, then follow the rules that apply to your circumstances.

04 Check before signing

- [ ] Review the finished wording and intended gifts. Make sure the will reflects your own wishes and that you understand it.
- [ ] In England and Wales, you must normally be 18 or over, have capacity and make the will voluntarily. An ID check does not establish capacity.
- [ ] For England and Wales, sign with two witnesses both present. Each witness must sign in your presence. Do not rely on an online signature as a substitute for the required formalities.
- [ ] Northern Ireland and Scotland have their own requirements. Use local guidance or a qualified professional rather than assuming the England-and-Wales process applies.

05 Protect the original

- [ ] Store the signed original safely and tell your executor or a trusted person where it is. Probate normally requires the original, not a photocopy.
- [ ] Keep a scan as a useful reference if you wish. A scanned copy is not the signed original.
- [ ] OpenWill supports timestamped versions, witness ID records and stored copies released to named people. These records do not guarantee legal validity.

06 Review after life changes

- [ ] Review your will after marriage or civil partnership, separation, a new child, bereavement, moving country or a major change in assets.
- [ ] Check local law before changing your will. Marriage generally revokes a will in England and Wales (with exceptions), but not in Scotland.
- [ ] Arrange any replacement will or codicil with the required formalities. Do not simply alter a signed document.

Official guidance (checked 26 October 2026):
gov.uk/make-will · gov.uk/make-will/make-sure-your-will-is-legal
gov.uk/applying-for-probate/if-theres-a-will
mygov.scot/create-will · nidirect.gov.uk/articles/making-will