

FOR PARENTS OF UNDER-18S · ENGLAND
& WALES

WillSafe
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PRODUCT · WS-070

Guardianship Intentions Workbook

For parents thinking about who would raise their children

*A side-by-side companion to your Will, so the people you name as guardians
actually know what you want.*

For England & Wales

A self-help template kit, not legal advice

The complete DIY estate plan, done properly.

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Welcome

Naming a guardian in your Will is the most important sentence you'll ever write. It is also, almost always, the one parents put off the longest.

This workbook is here to help. It walks you through choosing a guardian, talking to them about it, and writing down everything they'd need to know, the schools, the medical history, the routines, the values, so that if the worst happens, the person stepping in has a fighting chance of getting it right.

REMINDER

Naming a guardian in your Will only takes effect after the death of the last surviving parent with parental responsibility. If both parents are alive, the surviving parent looks after the children. This workbook is for the scenario where neither of you is here.

What's inside

PART 1

Choosing a guardian (and a backup)

PART 3

The handover pack, everything they'd need

PART 5

Bonus extras: school cheat sheet, day-in-the-life notes, values letter

PART 2

Having the conversation

PART 4

Financial provision, making sure money is there

Part 1, Choosing a guardian

What the law requires

- Guardians must be over 18 and have capacity.
- Appointment is made in your Will (or by separate written document, signed and witnessed).
- Only a parent with parental responsibility can appoint a guardian.
- Both parents should appoint the same guardian. If you disagree, the courts decide.

The values triangle, what to think about

Three things matter most. Pick people who score well on all three.

1. Values alignment

Do they share your views on the big things, education, religion, money, screens, discipline? You don't need a clone of you; you need someone whose default settings overlap with yours.

2. Practical capacity

Do they have the time, energy, space, and finances? A friend who'd be perfect on values but is themselves raising four young children might not realistically be able to take on more.

3. Willingness

Have they said yes? Have they really said yes, after thinking about it, not just yes-in-the-moment? Better to ask three times.

THE AGE TRAP

Many parents instinctively name their own parents (the children's grandparents). It feels right. But by the time guardianship would kick in, grandparents may be in their 70s or 80s. Either name them as immediate guardians with younger backups, or name the younger generation first.

Two guardians or one?

You can appoint a single guardian, joint guardians (e.g. a married couple), or one as backup to the other. Most common pattern: name your sister and her husband jointly, with your best friend as substitute if neither of them can act.