

Will Preparation Checklist

Personal information about both you and your spouse

- ☐ Full legal names
- ☐ Address and telephone numbers
- ☐ Occupations
- ☐ Date and place of births
- ☐ Full names and date of births of all your children
- ☐ Information about your children: are they adopted, infirm, born out of wedlock or are your children from a previous relationship?

Information about your marital status

- ☐ Date and place of current marriage
- ☐ Do you have a prenup?
- ☐ Information about previous marriages
- ☐ Any children of previous marriage?
- ☐ Is prior spouse still alive?
- ☐ Are there any existing separation agreements?

Summary of your Assets

- ☐ Cash and bank accounts, where located
- ☐ Life insurance policies
- ☐ What amount and who is the beneficiary?
- ☐ Any securities, pension plans, annuities, etc?
- ☐ With who, what amount, and is there a designated beneficiary?
- ☐ Your principal residence (home)
- ☐ Type of ownership: sole, joint tenants or tenants-in-common
- ☐ Current market value, amount of your equity and mortgages
- ☐ Similar information on any other real estate
- ☐ Information on businesses owned: proprietorships, partnerships or companies you have an interest in
- ☐ Any inheritance expected or other money or assets you are expecting?
- ☐ List of household furnishings, cars, boats, jewelry and other personal belongings of sentimental value
- ☐ List any debts, such as loans, mortgages, guarantees, promissory notes, and amount owed and to whom

Outline of beneficiaries

☐ Do you have minor children or disabled children? At what age do you want your children to have access to their bequest?

☐ In the event that you and your spouse are killed in a common disaster (e.g. auto or plane crash), how do you want your estate to be distributed?

☐ Who do you want specific personal possessions to go to?

☐ Do you have alternative beneficiaries in case designated beneficiaries die before you or cannot be located?

☐ Who do you want cash requests to go to and the amounts of each request? (e.g. spouse, children, former spouse, children by former spouse, family relatives, friends, business associates, charitable organizations, educational or other institutions)

Names of people in your Will who will represent your interests

An Executor handles your estate. Trustee and guardian are for your minor children

☐ List Executor, trustee, guardian name and address

☐ Do they know the location of your safe deposit box?

☐ Have you selected alternatives?

Other Information to Obtain

☐ Have you considered having a "Living Will" (name an agent in the case of a terminal or serious illness)

☐ Have you considered having Power of Attorney to someone over your affairs in certain situations (financial)?

☐ Do you have a previous Will and when was it last reviewed?

☐ Details on burial wishes and funeral service instructions

☐ Have you considered setting up a testamentary trust to have some or all of your assets in your estate managed on your death on behalf of your spouse or children?

Additional information can be provided below