

Checklist: Writing A Will

Getting Started

This checklist will prepare you for the decisions you're going to have to make when creating a Will, whether you create one with an attorney or an online legal service.

Here's what we cover:

- Choosing Beneficiaries
- Naming An Executor
- Naming Guardians For Children Or Adults With Special Needs
- Additional Notes & Instructions

Remember

[Create an Everplan](#) to easily and securely update and share this vital info with the people you love and trust.

CHOOSE YOUR BENEFICIARIES

When I die, I would like my money and the things I own (my estate) to be given to the following people and organizations in the following amounts (dollar value, specific objects, or percentage of the total estate):

Name	Amount/Items
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____

CHOOSE YOUR EXECUTOR

The person I would like to have oversee my estate, including submitting my Will to probate, paying any bills, dues, or taxes, and distributing my estate to my beneficiaries according to my wishes is:

If this person is unable to serve as my Executor, I would like my back-up (“successor”) Executor to be:

CHOOSE GUARDIANS FOR MINOR CHILDREN OR DEPENDENT ADULTS

If I should die, the person I would like to raise my child/children/dependent (serve as guardian of the person) is: _____

If this person is unable to serve as guardian, I would like my back-up (“successor”) guardian of the person to be: _____

The person I would like to handle the finances of my child/children/dependent (serve as guardian of the estate) is: _____

If this person is unable to serve as guardian, I would like my back-up (“successor”) guardian of the estate to be: _____

