

Making Your Will Workbook

Important: This workbook cannot be used as a will.

A will is a legal document that leaves instructions about what you want done with your property and belongings after your death. Making a will is the only way to make sure that your property is distributed as you wish. Completing this workbook will help you think about what you want to include in your will. You can take this booklet with you to your lawyer's office when you make your will.

Name in full: _____

Address: _____

Occupation: _____

Date of birth: _____

Marital status: _____

Full name & address of spouse or partner: _____

Full names of dependents

Age

Full name and address of executor or executors

You can name more than one person, or you can name a law firm or trust company to act for you. You must specify whether they can act as alternates or must act together. Ask if they are willing to be your executor before you name them.

Assets

List your assets or all the things you own. Include real estate, bonds, bank accounts, insurances, vehicles, household property.

Liabilities

List your liabilities, or all the things you owe. Write down how much is owed, to whom, and if it is insured.

Conditions

Are there any specific conditions you would like in your will? For example, you might want an heirloom passed on to someone, but not until that person reaches a certain age.

Beneficiaries

List the names of your beneficiaries, their relationship to you (for example, friend, son) and what you would like each of them to receive. This could be a specific bequest or gift, like land or money, or it could be a percentage of your estate.

Guardianship

If you have a child or other relative who needs a guardian, you can name a guardian in your will. Be sure to ask the person if he or she is willing to be guardian and get this in writing. Give the full name and address and relationship to you. The appointment of a guardian must be confirmed by the court, but this lets the court know your wishes.

Common disaster or limited survival

If partners die at the same time or one shortly after the other from a common disaster like a car accident, your executor needs to know what you want done with your property. For example, it may be that you will want another family member to inherit your estate or trusts to be set up for your children. List here what you want to happen.

Personal Mementos

These instructions are often not in the body of the will but on an attached sheet so changes can be made more easily. List any small things of value to you and name the person you would like to have the item.

Important Information to have available

<u>Document</u>	<u>Any particulars</u>	<u>Location</u>
Will	_____	_____
Birth certificate	_____	_____
Marriage certificate	_____	_____
Divorce papers	_____	_____
Safety deposit box	_____	_____
Funeral plans	_____	_____
_____	_____	_____
Prepaid/prearranged Funeral	_____	_____
Deeds	_____	_____
Tax returns	_____	_____
Insurance policies	_____	_____
Mortgages	_____	_____
Burial plot	_____	_____
Health care directive	_____	_____

<u>Advisor</u>	<u>Name</u>	<u>Contact Information</u>
Doctor	_____	_____
Lawyer	_____	_____
Banker	_____	_____
Accountant	_____	_____
Insurance agents	_____	_____
Stockbroker	_____	_____
Other	_____	_____

<u>Children</u>	<u>Contact information</u>	<u>Grandchildren</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

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