



WILL PREPARATION CHECKLIST

INFORMATION TO GET STARTED

- Basic information about your loved ones
- A general sense of your assets and debts

PEOPLE TO TALK TO

- Executor(s)
- Guardian(s)

REMEMBER!

Your Will shouldn't include life insurance or pension plan policies, certain jointly owned properties, gifts given directly to pets, and funeral and burial wishes.

QUESTIONS TO ASK YOURSELF

- Who will raise your kids?
- Who will carry out your final wishes?
- Do you want to leave specific gifts to people?
- Who will care for your pets?
- How do you want to distribute your assets?
- Do you want to give money to charity?
- Who will get your digital assets?
- When can minor beneficiaries access their inheritance?
- If any of your beneficiaries die, how should their inheritance be split?
- What is your plan for the worst-case scenario?
- Will you make your Will online or with a lawyer?