

Will Checklist

Gathering some information before you start making your will can make the process easier. This worksheet lists everything you will need to make your will. Some of this information depends on important decisions that you may not have made yet. If you're not sure about something listed here, don't worry. As you make your will, we provide plenty of guidance to help you make these choices.

- You:** full legal name and gender
- Spouse:** full legal name and gender
- Children:** full legal names and birth dates
- Personal guardians:** names of people to care for your young children if you cannot
- Pets:** name and description of your pet and names of caretakers who will care for your pet if you cannot
- Property:** a rough inventory of what you own (if you plan to leave everything to one or a few people, you can skip this)
- Beneficiaries:** the names of those to whom you want to leave your property
- Alternate beneficiaries:** the names of those to whom you will leave your property if your first-choice beneficiaries die before you do
- Property guardians:** names of people to manage your young children's property if you cannot
- Custodians or trustees:** names of people to manage property you leave to young beneficiaries
- Debts to forgive:** if you want to forgive debts owed to you, then the name of the person who owes you money, when the debt was incurred, and the amount of the debt you want to forgive
- Executor:** the names of people who will wrap up your estate, including alternates
- Details:** (optional) additional information about the people you've named in your will, including gender, birth date, address, phone, and email address