
Checklist for Will Planning

If you are ready to move forward with the creation of a Will Plan, below is a list of items to bring with you to your appointment:

1. Who would you like to manage your assets if you became disabled during your lifetime?
2. Who would you choose to make decisions regarding your healthcare if you are unable to do so yourself?
3. Who would you want to manage your affairs after your death?
4. Who do you want to leave your estate to upon your death?
5. Do you want to make any charitable donations? If so, let us know which charities and amounts you wish to gift.
6. Do you want to give any specific gifts? If so, how much and to whom do you want to receive it.
7. If you pass away with children under the age of 18, who would you want to be their Guardian?
8. Full Legal Names, addresses, phone numbers and birthdates of all children.
9. Full Legal Names, addresses, phone numbers of all other individuals mentioned in your estate planning documents

If you do not have all of the information listed above, don't worry! The attorney can discuss the information needed at your appointment and you can provide the missing information to them at a later date.