

Checklist for Writing a Will

A simple planning worksheet to organize the information needed before creating your will.

Use this checklist to prepare your choices before writing your will. This worksheet is not a will. Your completed will must be signed according to your state law.

Personal Information

Full legal name: _____

Address: _____

Date of birth: _____

Choose an Executor

Primary executor full name: _____

Alternate executor full name: _____

Appoint a Guardian (If Applicable)

Primary guardian full name: _____

Alternate guardian full name: _____

Identify Beneficiaries

Beneficiary 1: _____

Beneficiary 2: _____

Additional beneficiaries: _____

Specific Gifts

Specific gifts are individual items you want to leave to a particular person, such as jewelry, family heirlooms, artwork, collectibles, furniture, or other personal property.

Specific Gift	Person Receiving the Gift
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Residuary Property

Residuary property is anything left in your estate after specific gifts, expenses, debts, and taxes are handled. Decide how the remainder should be divided. The percentages MUST total 100%.

Name	Percentage of Remaining Estate
_____	_____
_____	_____
_____	_____
_____	_____

Pet Care Instructions (If Applicable)

Pet: _____

Caretaker: _____

Pet: _____

Caretaker: _____

Choose a Digital Executor (To Handle Online Accounts)

Digital executor full name: _____

Include Charitable Bequests

Charity 1: _____ % or \$ _____

Charity 2: _____ % or \$ _____

Additional charities: _____ % or \$ _____

Steps to Take After Your Will Is Completed

Store your signed original will in a secure location: _____

Tell your executor where the original will is stored: _____

Register the location of your will with The U.S. Will Registry (Free): _____

Witnesses (Review Legal Requirements for Your State)

Witness 1: _____

Witness 2: _____

Basic Witness Guidelines:

- Witnesses cannot be beneficiaries.
- Witnesses must be at least 18 years old.
- Witnesses must be of sound mind.
- Review your state requirements before signing.

Complete a self-proving affidavit (to help avoid witness testimony during probate, if allowed in your state): _____

Register and Store Your Will

Register the location of your will with The U.S. Will Registry (Free): _____

Store the original will in a secure location: _____

Tell your executor where the original will is stored: _____

Store a digital copy in secure document storage, if desired: _____

Regularly Review and Update

Next review date: _____

Update after major life events, such as marriage, divorce, birth, death, or major property changes:

Final Steps

Review the completed will: _____

Sign and date the will according to state law: _____

Have required witnesses sign: _____

You can go to [The U.S. Will Registry](https://www.theUSWillRegistry.org) to create your free will online!