

Checklist for Writing a Will

Personal Information

- Full name: _____
- Address: _____
- Date of birth: _____

Choose an Executor

- Full name of executor: _____
- Contact information: _____

Appoint a Guardian (if applicable)

- Full name of guardian: _____
- Contact information: _____

Identify Beneficiaries

- Beneficiary 1: _____
- Beneficiary 2: _____
- Additional beneficiaries: _____

Specify Assets and Distribution

- Real estate properties: _____
- Bank accounts: _____
- Investments: _____
- Personal property: _____
- Other assets: _____

Choose a Pet Executor (if applicable)

- Full name of executor: _____
- Contact information: _____

Choose a Digital Executor (to handle your online accounts)

- Full name of executor: _____
- Contact information: _____

Include Charity Bequests

- Charity 1: _____
- Charity 2: _____
- Additional charities: _____

Add Any Special Instructions

- Special instructions 1: _____
- Special instructions 2: _____
- Additional instructions: _____

Review Legal Requirements

- Witnesses' full names: _____
- Notary public (if required): _____

Register and Store Your Will

- Register with The U.S. Will Registry (Free): _____
- Store will in a secure location: _____
- Provide copies to executor and beneficiaries: _____

- Store will in iCloud Document Storage (Free w/SideDrawer.com)
:_____

Regularly Review and Update

- Schedule for reviewing will: _____
- Update will after major life events: _____

Final Steps

- Consult with an attorney: _____
- Sign and date the will: _____