

Will Preparation Checklist

Overview

Putting your Will in place is composed of the following steps:

1. **ASSESS:** We can help you determine if a simple Will is right for you.
2. **PREPARE:** Prepare for your Will to be drafted (see Will Preparation Checklist below)
3. **DRAFT:** Discuss and draft your Will
4. **EXECUTE:** Sign and witness your Will
5. **FILE:** File your Will (see Will Filing Checklist below)

Will Preparation Checklist

1. Decide who you want your **executor(s)** to be. They are responsible for following the instructions in your will and will have complete authority over your assets and estate. They must be people whom you trust, and you should reasonably expect them to outlive you. They do not have to be beneficiaries, but they may be. You should name at least two executors in case one is unable to act. You can also name co-executors (a set of executors who must come to unanimous approval).
2. Decide who you want to be **beneficiaries** – this is who receives some or all of your estate. (usually your partner and/or your children).
3. Decide who you would like to be the **guardians** of your minor children if appropriate.
4. Decide if you have **specific items** you want to leave to specific people.
5. Decide who you would like to **witness** your will. Witnesses cannot be beneficiaries. Myself and my wife can act as your witnesses if you live nearby.
6. Decide where you want to **store** your will. This is necessary when filing your will in the registry of wills. A safety deposit box is a good place, but your sock drawer works too. Each come with their own costs or risks.
7. Now you are ready to draft and file your will. Visit our website and fill in the [Simple Will Request](#) form.
8. It is also prudent, but not required, to create an inventory of relevant estate details (see attached [Estate Inventory](#)).

Will Filing Checklist

1. Ensure your Will is fully initialled and signed by yourself and witnesses.
2. Place your signed Will in its storage location
3. File the location of your Will with the Wills Registry
4. Inform Executors and Guardians (optional)

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Record information for your will here		
You and Partner	Your name/address: Phone/email: Formerly of:	Partner name/address: Phone/email: Relationship:
Executors	Name/address: Phone/email:	Name/address: Phone/email:
Witnesses (cannot be executor nor child nor beneficiary)	Name/address/occupation: Phone/email:	Name/address/occupation: Phone/email:
Children and Beneficiaries	Name/address and bequest: Relationship:	Name/address and bequest: Relationship:
	Name/address and bequest: Relationship:	Name/address and bequest: Relationship:
	Name/address and bequest: Relationship:	Name/address and bequest: Relationship:
Other Notes (attach additional pages as needed)	I wish to be cremated OR buried OR other arrangements. Guardians for minor children (name/address): Intended storage location for my Will:	