

Checklist for Creating a Last Will & Testament

Congratulations: You are taking an important step to ensure that your wishes will be known and followed.

*****Making it easy for those—family members, caregivers, executors, and heirs—means that they will be able to do exactly as you wish.*

While a majority of your assets are disbursed in your will, there are many items that need to be addressed outside of physical assets. Naming a power of attorney and executor is just one step. It is important to get all your finances organized so your heirs can easily locate what they need. According to the National Association of Unclaimed Property, [around \\$32.9 billion assets are currently unclaimed](#) because they were not designated properly and the State claimed them instead of the family. So, whether you decide to write up your will with an estate planning attorney or not, you still need to get everything in order.

Two of the most important documents that are easily overlooked are your life insurance policy (especially policies from former employers) and any retirement plans (as well as annuities and pensions). If your heirs don't know these exist, they won't claim them and the funds usually go to the state. It is wise to try to keep them together.

****Once your Last Will is completed, go to www.WillsUS.com to [register your Will](#) with The U.S Will Registry. Registering your Will is **free** and ensures that in the event that your most recent Last Will can't be found, your Will can be quickly and easily located when needed—and will also remain completely private until needed. The U.S. Will Registry does **not** hold the actual copy of the Will, it holds the location or attorney holding your will.*

SET UP A MASTER FILE WITH THESE ITEMS TOGETHER:

- ✓ Will
- ✓ Trust documents
- ✓ Medications (dosages, name of prescribing physicians, pharmacy, address/telephone)
- ✓ Address and phone numbers of hospitals of choice
- ✓ Healthcare proxies/living wills
- ✓ Names/address/telephone numbers of healthcare professionals
- ✓ Letter of instruction
- ✓ Birth certificates
- ✓ Income sources (retirement and/or disability benefits, Social Security, etc.)
- ✓ Marriage certificates
- ✓ Divorce/separation papers
- ✓ Medicare numbers
- ✓ Medicaid numbers (caseworker numbers, address/telephone)
- ✓ Military records
- ✓ Citizenship papers
- ✓ Adoption papers
- ✓ Social security numbers/cards
- ✓ Passports (numbers and expiration dates)
- ✓ Driver's licenses (number, expiration dates)
- ✓ Social worker or caseworker names and contact information
- ✓ Passwords, web sites, and other digital information

- ✓ Financial assets (names of institutions, account numbers, address/telephone, current value of cash, form of ownership), bank accounts, stocks, bonds, mutual funds, money market funds, retirement and pension plans, IRAs, annuities, life insurance
- ✓ Liabilities (Creditor institutions, address/telephone, approximate amount of debt) of mortgages, personal notes, loans or IOU's, credit cards, other).
- ✓ Real Estate (property addresses, location of deeds, form of ownership, current value)
- ✓ Other assets (location of items/titles/documents/form of ownership, current value) including cars, boats, collectibles, inheritances, precious gems, household items, hidden valuables/items in storage, loans to family members/friends.

Below is a checklist for you to fill out (as best you can) so your Attorney will have most of what is needed to cover everything necessary for writing your will.

BE PREPARED TO GIVE YOUR ATTORNEY:

Your Legal Name _____
 Address _____
 Telephone _____
 U.S. Citizen? _____ If not, What Country? _____
 Social Security Number _____
 Date of Birth _____

Spouses Information

Legal Name _____
 Address _____
 Telephone _____
 U.S. Citizen? _____ If not, What Country? _____
 Social Security Number _____
 Date of Birth _____

LIST OF BENEFICIARYS *:

In Estate Planning, a **beneficiary** refers to a benefactor (person or organization) who would receive distributions from a trust, will or life insurance policy.

- Beneficiary 1
 First Name: _____ Middle _____ Last _____
 Social Security # _____ Relationship: _____
 Address: _____
 Phone: _____
 Email: _____
- Beneficiary 2
 First Name: _____ Middle _____ Last _____
 Social Security # _____
 Address: _____
 Phone: _____
 Email: _____
- Beneficiary 3

First Name: _____ Middle _____ Last _____
Social Security # _____
Address: _____
Phone: _____
Email: _____

Beneficiary 4

First Name: _____ Middle _____ Last _____
Social Security # _____
Address: _____
Phone: _____
Email: _____

If there are any minor children it is suggested you have their birth certificate, and if they are adopted children, its best to have the adoption papers.

ASSET INFORMATION:

An **asset** is anything of value that can be converted into cash. Assets are owned by individuals or businesses. Some examples of assets include: certificates of deposit (CD's), Cash and cash equivalents, savings or checking accounts, Savings Bonds, Treasury bills; Money Market accounts.

Bring copies of all documents you have that show any assets you will want distributed among your beneficiaries.

Documents to consider:

Deed/s to home, residential, land, or commercial property you own

Principal Property: _____

Joint Tenancy w/Spouse Tenancy in Common Life Estate

Address: _____

City: _____ ST: _____ Zip: _____

Second Property:

Type of Property: (Income, Rental, Commercial) _____

Joint Tenancy w/Spouse Tenancy in Common Life Estate

Address: _____

City: _____ ST: _____ Zip: _____

Titles to any property or vehicles you own

Statements for any

(The statements will have all the information necessary. Account Numbers, Name account is in, etc.)

Bank Statements Money Market Accts Bonds Stocks 401K

Brokerage Accounts Retirement Accts IRA's Annuities Roth

Insurance Policies Mutual Funds Pension Benefits

Social Security

Business Interest Contracts

(Type of Entity, Nature of Business, Ownership Share, Income from business)

Receiving any other income

Funeral Home Documents

PERSONAL PROPERTY:

Personal property is generally considered property that which is not stationary (such as real estate).
Examples of personal property would be: Jewelry, Antiques, Artwork, and Collectibles

Item (Value): _____ **Item (Value):** _____

Item (Value): _____ **Item (Value):** _____

Item (Value): _____ **Item (Value):** _____

NAME, ADDRESS, & PHONE NUMBERS FOR:

Doctors:
Name: _____
Address: _____
Phone: _____
Email: _____

Accountant:
Name: _____
Address: _____
Phone: _____
Email: _____

Financial Advisor:
Name: _____
Address: _____
Phone: _____
Email: _____

Funeral Home or Burial Information
Name: _____
Address: _____
Phone: _____
Email: _____

Have this information on hand:

Safe Deposit Box
 Safety Deposit Key Location of Key _____

Power Of Attorney
First Name: _____ Middle _____ Last _____
Social Security # _____ Relationship: _____

Address: _____

Phone: _____

Email: _____

Living Will (Medical Directive)

Location of where it is located or Registered: _____

Disability Insurance

Company Name: _____ Policy # _____

Long Term Care Policy

Carrier Name: _____ Policy # _____

DEBTS AND LIABILITIES:

Debts usually refer to bank or auto loans, mortgages and credit card balances.

Liabilities usually refer to projected expenses related to other financial commitments (i.e. like utilities, gym memberships and cell phone services). You often pay for these services every month.

Credit Cards in your name

Card Name: _____ Balance: _____

Card Name: _____ Balance: _____

Card Name: _____ Balance: _____

Mortgages where you are the Mortgagee (holder of the mortgage):

Identify Property Address & Balance: _____

DID YOU KNOW.....

*The only resource Estate Planning Attorneys and the public have to [locate a missing Will](#) is by searching The U.S. Will Registry.

*Studies have revealed that 67% of seniors stated that their children would not know where to how to find their Last Will.

*From the time a person reaches 50 years of age, they will move an average of 3 times. It is at this time that a Last Will gets lost or goes missing.

*70% of those who reach 75 years of age will be a blended family.

It is for this reason that [registering your Will](#) is imperative.

What happens if my Will cannot be found after you passed on?

- Your beneficiaries may never receive their inheritance in accordance with your wishes.
- A previous Will that you never intended to be used may be discovered and deemed as your final wishes.
- Family disputes occur.

- Your Will may not be found until after your estate has been distributed, and therefore not honored.
- Your children and dependents may not be looked after in the way you have chosen.
- It would be assumed that you never had a Will.

In order for a Will to be executed, it must be found!
BE SURE TO REGISTER YOUR WILL AT: www.WillsUS.com