JESSON RAINS LLP
Estate Planning, Business & Construction Attorneys

WILL PREPARATION CHECKLIST

1. Personal Information about both you and your spouse (if applicable).
____ Full Legal Names
____ Address, telephone numbers, and email addresses
____ Occupations
____ Date and place of births
____ Citizenship status
____ Full names and date of births of all your children
____ Information about your children: are they adopted, infirm, born out of wedlock or are your children from a previous relationship?

2. Information about your marital status?
____ Date and place of current marriage.
____ Do you have a marriage contract? If so, please provide a copy.
____ Information about previous marriages.
____ Any children of previous marriage?
____ Is prior spouse still alive?
____ Are there any existing separation / divorce agreements? If so, please provide a copy.

3. Summary of your Assets
____ Cash and bank accounts. Type of ownership.
____ Life insurance policies. Type, amount, and who is the beneficiary?
____ Any securities, pension plans, annuities, 401K or Roth IRA's? Amount and who is the beneficiary? Type of ownership? We may need to see account information to verify ownership type and beneficiary designation.
____ Your principal residence (Home)
    ____ Type of ownership
    ____ Current market value, amount of your equity and mortgages
____ Similar information for any other real estate – location?
____ Information on businesses owned: proprietorships, partnerships or private companies in which you have an interest.
____ Any inheritance expected or other money or assets you are expecting? Beneficiary of a trust or annuity?
____ Your personal effects, household furnishings, cars, boats, paintings, jewelry, family heirlooms, and antiques – list things of value or items that you would like to specifically bequest to someone in your will.
    ____ Jointly owned personal property?
____ Patents, copyrights, franchises, mineral rights?

____ Are any debts owed to you?
____ Location of safety deposit box and important papers. Do you have a safe or fire box at home?

4. Summary of your Debts
   ____ List any debts, such as loans, mortgages, guarantees, credit cards, promissory notes.
      ____ Amount owed and to whom?
      ____ Joint debt?

5. Names of Beneficiaries and Representatives
   ____ Who do you want to inherit specific pieces of property? (e.g. spouse, children, former spouse, children with former spouse, family relatives, friends, business associates, charitable organizations, educational or other institutions)
   ____ Who do you want to inherit your money (if different from above)?
   ____ If you and your spouse die at the same time, how do you want your estate to be distributed?
   ____ Successor beneficiaries should be named for each bequest in case designated beneficiaries predecease you.
   ____ Do you have minor children or disabled children or grandchildren?
      ____ If you and your spouse pass away leaving minor children, who do you want to serve as the children's guardian?
         ____ Successor guardian?
      ____ If you and your spouse pass away leaving minor children, at what age do you want your children to have access to their inheritance?
      ____ Who do you want to manage the money on behalf of your children? They would be called "Trustee". This can be the same person as the children's guardian.
         ____ Successor trustee?
   ____ Who do you want to serve as the executor of your estate?
      ____ Successor executor?

6. Other Information to Obtain
   ____ Names and addresses of financial advisor, CPA, banker, other attorneys.
   ____ Have you made a Will or Trust before? When was it signed, located and when was it last reviewed?
   ____ Details on burial wishes and funeral instructions. Paid for?
   ____ Any pending litigation?
   ____ Have you made any large gifts to friends or family?

This checklist is meant as a guide. Your situation may be different. Please contact my office to arrange your appointment to complete your Will.