



# Checklist for Making a Will

This checklist is **NOT** your will! It is your “worksheet” or notes to help you prepare for your first meeting with the lawyer who will draft your will. If any of the tables below don’t give you enough space for your information, just use another sheet of paper. Or, you can use the online version which is fillable. Consider the following 10 steps:

## Gather and review all documents related to your estate assets.

### Step 1: Make a detailed list of all your property and assets.

(E.g. home, car, bonds, bank accounts, household property, personal items. Don’t forget pensions, insurance and annuity contracts. Include all assets even those that may not be covered by your will.)

Asset Description

Where to find key documents

Asset Description

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Where to find key documents

**Remember,** if you are legally married, you cannot give away your spouse’s share of the marital property in your will.

**Step 2: List all your debts (e.g. mortgage, loans, etc.)**

Debt Description

Where to find key documents

Debt Description

Where to find key documents

Debt Description

Where to find key documents

**Step 3: List your key documents (be sure to make copies) such as:**

Birth, death, marriage/ divorce certificates

Investment portfolio account numbers

Family law orders or agreements

Insurance policy numbers

Deeds and mortgages

Funeral plans and burial lot information

Bank account numbers

Copy of any previous wills

**Step 4: List your advisors**

**1. Lawyer's Name/Company**

Mailing Address

**2. Banker's Name/Company**

Mailing Address

**3. Accountant's Name/Company**

Mailing Address

**4. Investment Dealer's Name/Company**

Mailing Address

**5. Insurance Agent's Name/Company**

Mailing Address

**My Notes**

Make sure your family and executor(s) know where you keep this information, particularly your funeral plans. They will need it immediately after your death, so don't put funeral plans in your will.

**Step 5: Consider who you want as your executor (and, possibly, co-executor)**

Consider naming an **alternate executor** in case the executor is not able to act.  
Speak to these people to be sure they agree to act!

Name of Executor

Name of Co-Executor

Name of Co-Executor

Name of Alternate Executor

Name of Guardian for dependant children

**Step 6: Decide who you want to leave your estate to and list your beneficiaries.**

Include their full names and addresses.

1. Name of Beneficiary

Mailing Address

2. Name of Beneficiary

Mailing Address

3. Name of Beneficiary

Mailing Address

**Step 7: Make a list of any minor children or dependant adults you want to inherit.**

Make a list of any minor children (e.g. child, grandchild, niece or nephew) or dependant adults you want to inherit. Who do you want to be responsible for the minor's share? Do you want to specify a certain age when that would end? In the table below, include the full names and addresses, as well as details of your children's ages and special needs.

<b>1. Name of Child /Dependant</b>	Age
Mailing Address	
Special Needs (if applicable)	
Who I would like as guardian for this child/dependant	

<b>2. Name of Child /Dependant</b>	Age
Mailing Address	
Special Needs (if applicable)	
Who I would like as guardian for this child/dependant	

<b>3. Name of Child /Dependant</b>	Age
Mailing Address	
Special Needs (if applicable)	
Who I would like as guardian for this child/dependant	

### Step 8 : Decide if you wish to leave bequests.

Bequests are specific items of personal property (such as a car, jewelry, china, silver, art, furs, etc.) or a sum of money that you wish to leave to a specific person.

### Step 9 : Decide whom you wish to inherit the remainder of your estate.

Do you want the remainder to go to your spouse? adult children? charities? If you want to leave something to an organization or charity, try to find out the full legal name of that organization. Most lawyers can verify the exact name if you are unable to do so. Do you want the inheritance to go directly to the person, or through a trust?

### Step 10 : Discuss with your spouse the options for dividing the remainder of your estate.

If you are in a second marriage and you both have children from previous marriages, it is very important that you discuss the options and agree on your plans. For example, the remainder of your estate can go to:

- (a) your spouse absolutely;
- (b) your children absolutely;
- (c) your spouse for his or her use while alive, and then, after your spouse dies, to your children;
- (d) your children and the children of your spouse.

Planning ahead and gathering documents means you will be well-prepared when you meet with your lawyer. That should save you time and money.



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This **Checklist for Making a Will** has been created by Public Legal Education and Information Service of New Brunswick. PLEIS-NB is a non-profit charitable organization that educates the public about the law. For more helpful information on estate planning, check out our free publications: *Making a Will*, *Choosing an Executor*, *Probate of a Will*, and *Dying Without a Will*.

Be sure to review our wills and estate planning publications on our website at [www.legal-info-legale.nb.ca](http://www.legal-info-legale.nb.ca).