

# Kennedy Child Study Center

151 East 67<sup>th</sup> Street New York, NY 10021 (212) 988-9500

## THE WILL-MAKING CHECKLIST

Before you sit down with your legal advisor to write or update your Will, use the form below to organize the details of what you want to accomplish. With this information in hand, you ensure that your attorney is aware of your specific wishes. (You might also save time and attorney's fees.)

### 1. People I care about:

Spouse: \_\_\_\_\_

Children: \_\_\_\_\_

Grandchildren: \_\_\_\_\_

Other Family Members: \_\_\_\_\_

Friends: \_\_\_\_\_

Others: \_\_\_\_\_

2. For whom do I feel responsible? \_\_\_\_\_

3. For whom do I need to care in the future? \_\_\_\_\_

4. Who will be guardian(s) of my minor children? \_\_\_\_\_

5. Who should be my executor, to carry out the wishes that I express in my Will?  
\_\_\_\_\_

### 6. Planners: Whom do I need to consult?

Spouse: \_\_\_\_\_

Children: \_\_\_\_\_

Attorney: \_\_\_\_\_

Accountant: \_\_\_\_\_

Financial Planner: \_\_\_\_\_

Others: \_\_\_\_\_

**7. Property I own:**

Real Estate: \_\_\_\_\_

\_\_\_\_\_

Farm Land: \_\_\_\_\_

Vehicles: \_\_\_\_\_

Stocks/Securities: \_\_\_\_\_

\_\_\_\_\_

Antiques: \_\_\_\_\_

\_\_\_\_\_

Jewelry: \_\_\_\_\_

\_\_\_\_\_

**8. Financial Assets:**

Bank Name: \_\_\_\_\_

Account Type: \_\_\_\_\_

Bank Name: \_\_\_\_\_

Account Type: \_\_\_\_\_

Bank Name: \_\_\_\_\_

Account Type: \_\_\_\_\_

Bank Name: \_\_\_\_\_

Account Type: \_\_\_\_\_

**9. Retirement Plans:**

Plan Name: \_\_\_\_\_

Plan Type: \_\_\_\_\_

Plan Name: \_\_\_\_\_

Plan Type: \_\_\_\_\_

Plan Name: \_\_\_\_\_

Plan Type: \_\_\_\_\_

**10. My Plan: What items, percentage, or dollar amount do I want people to receive when I die?**

Spouse: \_\_\_\_\_

Children: \_\_\_\_\_

Grandchildren: \_\_\_\_\_

Friends: \_\_\_\_\_

Church: \_\_\_\_\_

Other Charities: \_\_\_\_\_

Kennedy Child Study Center: \_\_\_\_\_