



151 East 67th 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 will 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. 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: _____