

Creating a Last Will & Testament

A Last Will and Testament is a crucial legal document that allows you to express your final wishes and ensure that your assets are distributed according to your desires after your passing. This comprehensive guide will assist you in creating a personalized Last Will and Testament, taking into account your unique circumstances and objectives.

Throughout this guide, you will be asked to provide essential information, such as your personal details, marital status, and the names of your beneficiaries. You will also have the opportunity to make important decisions regarding the distribution of your assets, including specific bequests to individuals or organizations, and the appointment of an executor to manage the administration of your estate. Additionally, you will be able to nominate guardians for any minor children or dependents, ensuring their care and well-being in the event of your absence.

By carefully considering each aspect of your Last Will and Testament and following the step-by-step instructions provided in this guide, you will create a legally binding document that clearly communicates your final wishes. This will provide you with peace of mind, knowing that your loved ones will be taken care of and your legacy will be preserved according to your desires.

Where do you live?

Your final documents will be tailored to your local state laws. This address should be your primary residence.

Address:

What is your full legal name?

Your full legal name will be included in all your legal documents, so be sure to double-check spelling.

Full Legal Name:

Do you have a spouse or partner?

Your current marital status will determine the type of documents for your situation and the specific legal language used to protect both you and your family.

Marital Status (choose one):

- ☐ Married
- ☐ Domestic Partnership
- ☐ Civil Union
- ☐ Single
- ☐ Other: _____

Spouse/Partner Name:

Do you have children?

Include a complete list of children, including all biological and adopted children, as well as any step-children that you wish to treat the same as your biological children in your plan.

Name

Birthday

Do you have pets?

Pets are an important part of many families and can be protected in your estate plan. You'll be able to assign backup caretakers and include an optional pet stipend.

Name	Description

Who are your beneficiaries?

Choosing your beneficiaries gives purpose to your whole plan. Consider who depends on you financially and who you would like your assets to support.

[illegible]

Do you want to give any specific gifts?

Gifts are an easy way to carve out specific personal items or small amounts of cash to give to friends, family, and charity.

Recipient Name	Relationship	Gift Description

Who do you choose as executors?

When picking a executor for your Will, choose someone trustworthy, responsible, and capable, ideally with some legal or financial knowledge, who understands your wishes and is willing to act in your best interests.

Executor Name	Relationship

Who do you choose as backup guardians?

Required only if you have minor children

When selecting backup guardians, choose individuals who share your values, are capable of providing a stable and loving environment, and are willing and able to take on the responsibility of caring for your children in your absence.

Guardian Name	Relationship

Who do you choose as backup pet caretakers?

Required only if you have pets

When choosing a caretaker for your pet, select someone who is compassionate, responsible, familiar with your pet's needs, and willing to commit to providing love and care for your pet's remaining lifetime.

Pet Caretaker Name	Relationship

Do you have preferences for final arrangements?

Your final arrangements are a highly personal topic and it is important to share your preferences with loved ones who can help to ensure your wishes are realized.

Final Arrangements:

- ☐ Let my executor decide - Your executor will have the discretion to make decisions around your final resting place and any funeral or memorial arrangements.
- ☐ I have specific wishes - You can lay out your preferences with burial vs. cremation, as well as specific plans for a funeral or memorial service.

Specific Wishes (if selected above):

Regarding my end of life ceremony, I direct that:

Regarding my body and final resting place, I direct that:
