

# Writing a Will Worksheet

The cornerstone of any effective estate plan.

## Getting Started

This worksheet contains some of the essential decisions you should consider and have at the ready before you sit down to write a will.

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## PROPERTY

Take a minute to consider the things you own that you'd like to leave in your will. These things are most commonly:

- Cash
- Real estate
- Cars
- Jewelry
- Family heirlooms: art, furniture, etc.

What is the value of each of these things? It's easy to break value into the following general amounts:

- Less than \$1,000
- \$1,000-\$10,000
- \$10,000-\$100,000
- More than \$100,000

Item	Value/Amount
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____
9. _____	_____
10. _____	_____

## BENEFICIARIES

You can name a family member or members, friends, pets (via a human guardian), strangers, organizations, or institutions as the beneficiaries of your estate. By identifying who gets what, you'll relieve some of the stress your family will have to face when settling your estate. If not, your heirs will have to make these decisions on their own.

Most commonly, people divide their assets in one of the following ways:

- Everything to my spouse
- Some specific gifts and the rest to my spouse
- Everything to my children in equal shares
- Some specific gifts and the rest to my children in equal shares
- Everything to someone else
- Some specific gifts and the rest to someone else

If you'd like to give specific gifts in your will, think about what you'd like to give to whom, and in what amount:

Item	Value/Amount	Beneficiary
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____
6. _____	_____	_____
7. _____	_____	_____
8. _____	_____	_____
9. _____	_____	_____
10. _____	_____	_____

## EXECUTOR

The person you name as your executor is responsible for paying any debts or taxes on behalf of your estate and making sure that the people who are supposed to inherit your assets actually get them.

An ideal executor is someone who has:

- Attention to detail
- An understanding of finance and perhaps business
- Patience, as the process may take a long time

Often, the person with all of these qualities may not be your closest friend or family member, but instead may be a friend or close colleague who you believe to be competent, honest, and intelligent. You may also appoint a professional that you have a relationship with, such as a trust and estate attorney or an accountant.

The person I would like to have oversee my estate, including submitting my will to probate, paying any bills, dues, or taxes, and distributing my estate to my beneficiaries according to my wishes is \_\_\_\_\_.

If this person is unable to serve as my executor, I would like my back-up (“successor”) executor to be \_\_\_\_\_.

## GUARDIANS

If you have children under the age of 18 or if you are the parent or guardian of a dependent adult, you’ll need to name a guardian in your will. The role of the guardian will essentially be the role you have now as a parent—caring for your children, acting in their best interests, and providing for them physically, emotionally, psychologically, spiritually, and culturally.

If the child's other natural parent is alive and competent, he or she will likely be granted guardianship, no matter whom you name in your will as your desired guardian.

If I should die, I would like \_\_\_\_\_ to raise my child, children, or dependent.

If this person is unable to serve as guardian, I would like \_\_\_\_\_ to serve as my back-up (“successor”) guardian.

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