



JACKIE PORTER

Making Your Will Workbook

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Important: This workbook cannot be used as a legal Will.

A Will is a legal document that leaves instructions about what you want done with your property and belongings after your death. Making a Will is the only way to make sure that your property is distributed as you wish. Completing this workbook will help you think about what you want to include in your Will. You can take this booklet with you to your lawyer's office when you make your Will.

Name in full:

Address:

Occupation:

Date of birth:

Marital status:

Full name & address of spouse or partner:

Full names of any dependents and their ages:



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Liabilities.

List your liabilities, or all the things you owe. Write down how much is owed, to whom, and if it is insured.

Conditions.

Are there any specific conditions you would like in your Will? For example, you might want an heirloom passed on to someone, but not until that person reaches a certain age.

Beneficiaries.

List the names of your beneficiaries, their relationship to you (for example, friend, son) and what you would like each of them to receive. This could be a specific bequest or gift, like land or money, or it could be a percentage of your estate.



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Guardianship.

If you have a child or other relative who needs a guardian, you can name a guardian in your Will. Be sure to ask the person if he or she is willing to be guardian and get this in writing. Give the full name and address and relationship to you. The appointment of a guardian must be confirmed by the court, but this lets the court know your wishes.

Common disaster or limited survival.

If partners die at the same time or one shortly after the other from a common disaster like a car accident, your Executor needs to know what you want done with your property. For example, it may be that you will want another family member to inherit your estate or trusts to be set up for your children. List here what you want to happen.

Personal Mementos.

These instructions are often not in the body of the Will but on an attached sheet so changes can be made more easily. List any small things of value to you and name the person you would like to have the item.



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Important Information to have available.

Document any particulars such as location of original Will and other important documents.

Birth certificate

Marriage certificate

Divorce papers

Safety deposit box

Funeral plans

Prepaid/prearranged Funeral

Deeds

Tax returns



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Insurance policies

Mortgages

Burial plot

Health care directive

Advisor Name and contact information

Doctor

Lawyer

Banker

Accountant

Insurance Agents

Stockbroker

Other
