

## WILL ORGANIZATION CHECKLIST

### ***Things you should put in a will:***

- \_\_\_ An Executor (who will administer your estate, take care of business details)
- \_\_\_ An Alternate Executor (in case the Executor can't or won't act in that capacity)
- \_\_\_ Guardian for your children under age 18 (if any)
- \_\_\_ Consider all classes of Beneficiaries to be included (ex.: children, a specific charity) \*
- \_\_\_ Distribution of chattels where direct conveyance is important (ex: heirlooms, mineral rights)
- \_\_\_ How much each individual, club, charity, etc. is to receive  
*Percentage or fraction terms are best and extend the useful life of the will.*
- \_\_\_ Alternate Beneficiary(s), who benefit if someone in the first group of beneficiaries is not alive
- \_\_\_ If responsible for adult or minor children, a trust or other provision for maintenance

\* *All your children may benefit as a class, but you may exclude some by name.  
If there are step or adopted children, name them specifically to avoid confusion.*

### ***Things better put in a letter stored with the will (for ease of change):***

- \_\_\_ Funeral and burial preferences, service order and participants, grave plot location
- \_\_\_ Individuals that you would like to see get specific personal effects
- \_\_\_ List of assets and their location (ex.: RRSPs, shares, bank accounts, life insurance, mineral rights, valuable collections, etc.)
- \_\_\_ Contact information for your accountant

*Besides offsetting taxes, including God's work in your Will allows you to proclaim in a final statement that for you, God is always part of the equation.*

### **To book an appointment or for more information, contact:**

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