

WILL CHECKLIST

- * Will
- * Title to Real Property
- * Beneficiaries on Financial Accounts/ Retirement Accounts
- * Trust
- * Gifts While Living
- * Identification of Heirs
- * Naming of Personal Representative
- * Naming of Guardian for Minor Children for Person and for Property
- * Standby-Custodial Document for Single Parents
- * Listing of Personal Property and Distribution or Gifts
- * Allocation of Taxes
- * Disinheriting Family Members
- * Second Marriage Issues and Adult Children of Both Spouses
- * Probate
- * Healthcare Directive
- * Financial Directive

This checklist is not a substitute for legal advice. If you have questions, then please consult wills and trusts attorney.

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