AGING IN MAINE
A PRACTICE OF KEVIN W. WEATHERBEE LAW OFFICES, PLLC

Your Will Planning Checklist

What to Think About Before Creating or Updating Your Will

Use this simple checklist to organize the information and decisions that may be important when creating or reviewing your Will.

1. Who Should Receive Your Property?

Think about the people or organizations you want to provide for.

- ☐ Spouse or partner
- ☐ Children
- ☐ Grandchildren
- ☐ Other family members
- ☐ Friends
- ☐ Charities or organizations

People or organizations I want to include:

2. Are There Specific Things You Want Someone to Receive?

Think about property that has financial or sentimental value.

- ☐ Home or land
- ☐ Vehicles
- ☐ Money or financial accounts
- ☐ Jewelry
- ☐ Family heirlooms
- ☐ Collections
- ☐ Other personal belongings

Specific gifts I want to consider:

3. Who Should Handle Your Estate?

Your Will can nominate a **personal representative** to handle your estate.

My first choice:

My backup choice:

4. If You Have Minor Children, Who Would You Want as Guardian?

My first choice:

My backup choice:

- ☐ I have discussed this with the person I would nominate.

5. Check Your Beneficiaries

Your Will may not control assets that have their own beneficiary designations.

Review the beneficiaries on your:

- ☐ Life insurance
- ☐ 401(k), IRA, or other retirement accounts
- ☐ Pension or retirement benefits
- ☐ Payable-on-death accounts
- ☐ Transfer-on-death accounts
- ☐ Other accounts with named beneficiaries

Beneficiary designations I need to update or check:

6. Review How Your Property Is Owned

Make a note of property you own:

- ☐ In your name alone
- ☐ Jointly with another person

☐ With a beneficiary designation
☐ Through a trust
☐ In another state

Property or accounts I have questions about:

7. Don't Forget the Rest of Your Estate Plan

A Will is only one part of estate planning. Check whether you have reviewed:

☐ Financial power of attorney
☐ Advance health-care directive
☐ Beneficiary designations
☐ Trusts, if applicable
☐ Digital accounts and assets
☐ Final wishes
☐ Plans for pets

8. Know Where Your Documents Are

☐ I know where my original Will is stored.
☐ Someone I trust knows where to find it.
☐ My important financial records are organized.
☐ My beneficiary and insurance information is accessible.
☐ I have contact information for the professionals my family may need.

9. Review Your Will After Major Life Changes

Consider reviewing your Will and estate plan after:

☐ Marriage or divorce
☐ Birth or adoption of a child
☐ Death of a beneficiary or loved one
☐ Buying or selling significant property
☐ A major financial change
☐ Retirement
☐ Moving to or from Maine
☐ A change in whom you want to handle your estate
☐ A change in whom you want to receive your property

My Next Steps

- ☐ Create or update my Will.
- ☐ Review my beneficiary designations.
- ☐ Review my power of attorney and advance health-care directive.
- ☐ Organize my important documents.
- ☐ Make sure someone I trust knows where my documents are.
- ☐ Write down questions I want to discuss with an estate planning attorney.

My questions:

This checklist is provided for general educational and organizational purposes only. It is not a Will and is not a substitute for legal advice regarding your individual circumstances.