CHECKLIST · FINANCIAL MANAGEMENT

FREE PREVIEW

Setting Up a Will and Estate Plan



Creating a will and estate plan ensures your assets are distributed according to your wishes. Use this checklist to start the process and protect your family's future.

10 steps · Print-ready A4

NAME	START	TARGET DATE

1 List Your Assets

Including property, bank accounts, investments, vehicles, and personal possessions.

TIP *Create a detailed inventory with approximate values to simplify distribution.*

2 Choose Beneficiaries

Decide who will inherit specific assets, such as family members, friends, or charities.

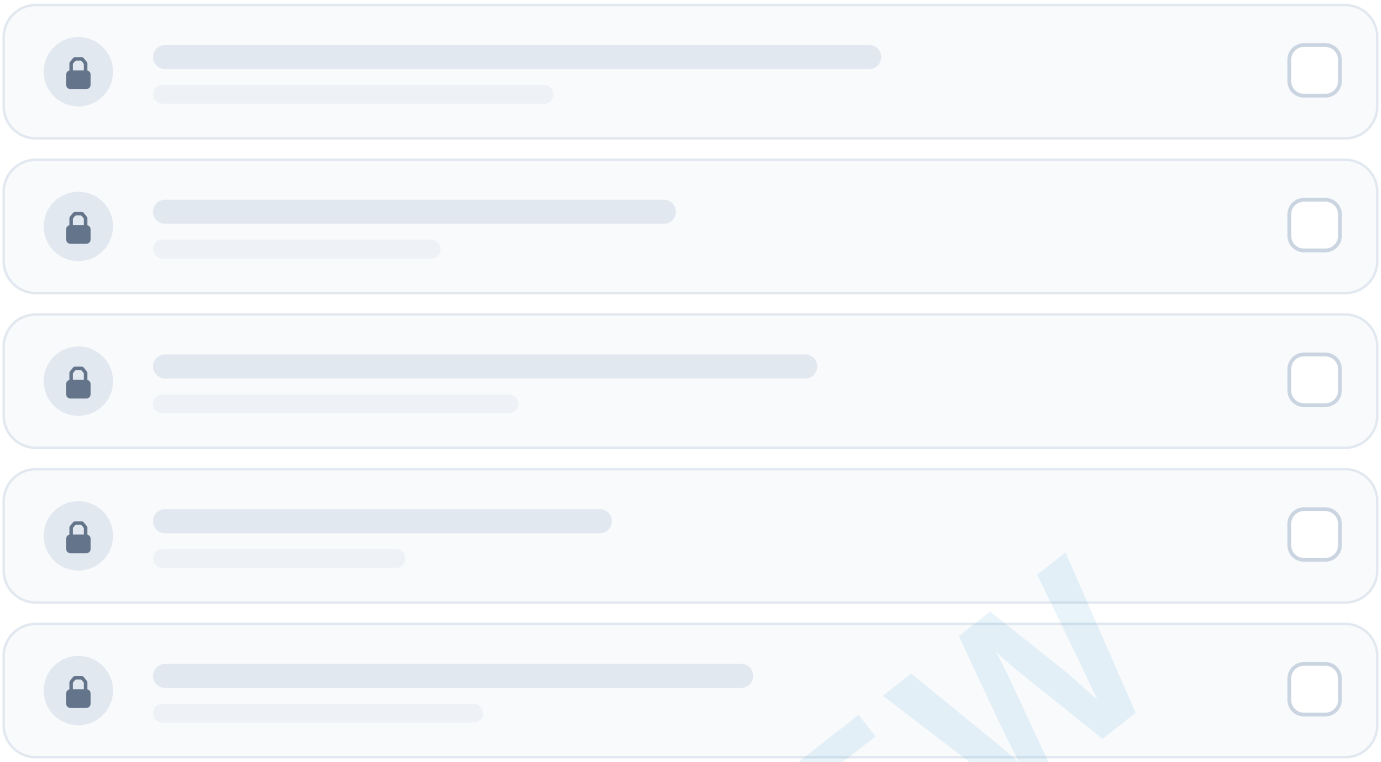
EXAMPLE *"Leave my home to my children and savings to my spouse and donate $5,000 to a local charity."*

3 Appoint an Executor

Select a trustworthy individual to manage your estate and carry out your wishes.

TIP *Choose someone organized and reliable and discuss the role with them beforehand.*

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