



### Will Preparation Checklist

Following are tips for writing your initial will and things to consider when you are updating an existing will. This checklist will be helpful in gathering the information to take to an attorney if you seek professional assistance.

- Identify yourself.** Use your full legal name, social security number, date of birth, and current address so there is no confusion with someone with a similar name.
- Include a declaration.** State that you are of legal age, that you are of sound mental health, and that this document represents your wishes and supersedes all other wills and codicils.
- List all family members to be covered by the will.** Identify family members by full name, birth date and relationship to you. Don't use nicknames in the document. Refer to family members by full name always so there is no confusion.
- Appoint an Executor.** Talk to the person you want to name as your executor first to ensure they are agreeable to performing this role. Include the executor's first and last name. Also name a backup executor. Alternately, you can name a trusted individual who will hire a paid professional to be executor when the need arises.
- Identify and bequeath your assets.** Name the beneficiaries and what each will receive. If you are dividing an estate, it is better to use percentages rather than dollar amounts. Make sure the percentages add up to 100 percent.
- Provide for minor children.** Appoint the person who will be responsible for their physical care. Set up a trust fund to be administered on your children's behalf.
- Write your will as if you might die tomorrow.** This is a practical step that takes into account your current assets, not your projected ones. You can change your will as things around you change.
- Seek professional financial counsel.** If you are likely to pay an inheritance tax, talk to a financial professional. He or she may be able to advise you on changes that could mitigate the amount.
- Be prepared to meet with an attorney.** If you plan on hiring a lawyer, write down everything that you want included in your will before your meeting. You pay your attorney by the hour, and being prepared will help keep costs down.
- Do not write on the will after it is signed.** Any additions will render the will null and void. Changes may be made by preparing a codicil.
- Consider a section on social media.** A social media will specify what you want to happen to your social media accounts when you pass away. You can appoint a separate person as an online executor, who can close email addresses, and social media profiles.

Please [contact my office](#) if you or a loved one has a question about Sharia compliant wills or if you need any further legal advice at (732) 515-5593.