

We're here to help make creating a will as accessible as possible. Use this worksheet during our Estate Planning 101 webinar to get the most out of the session!



### Who do you trust to wrap up your estate when you're gone?

Consider choosing \_\_\_\_\_ to be the executor of your will.  
Name

This person will carry out the wishes outlined in your will, including distributing funds to your beneficiaries and acting on behalf of your estate.

### Who do you want to give your assets to?

\_\_\_\_\_ would get \_\_\_\_\_  
Name Item description

\_\_\_\_\_ would get \_\_\_\_\_  
Name Item description

\_\_\_\_\_ would get \_\_\_\_\_  
Name Item description

Congrats – you've started creating a list of your beneficiaries.

These are individuals who you choose to pass on your property or belongings to when you are no longer living.

### Which charities, school or non-profit organization (if any) do you want to support when you're gone?

\_\_\_\_\_ would get \_\_\_\_\_  
Name of the charity/school/organization Describe your specific gift

You can leave an item of value, a percentage of your residual estate, or a set amount of money to help support a cause you care about.

Supporting a cause you care about through your will is a great way to leave a lasting legacy.

### Who would you trust to look after your minor children if something were to happen to you?

Consider choosing \_\_\_\_\_ to be a guardian/custodian for your children in your will.  
Name

This person will assume physical custody and the right to manage the assets of your children in the event you pass away.

### Who would you want to care for your pet(s) if something happened to you?

Consider choosing \_\_\_\_\_ to be a guardian for your pet in your will.  
Name

This person will assume the responsibility of caring for your pet.

### Who would you trust to make health / medical decisions on your behalf if you were unable to?

Consider choosing \_\_\_\_\_ to be the power of attorney for healthcare.  
Name

This person will make decisions regarding your health care, housing, meals, and clothing if you are medically unable to do so yourself.

### Who would you trust to make property and financial decisions on your behalf if you were unable to?

Consider choosing \_\_\_\_\_ to be the power of attorney for property.  
Name

This person will make decisions about your property and finances if you are medically unable to do so yourself.

## Congrats on answering all the questions above!

You've completed the hardest part of creating your will – making the difficult decisions.

Now use this worksheet as a guide to create your legal will with Willful to ensure your wishes are honored and legally binding.

**Fun fact:** Many Willful customers complete their wills in as little as 20 minutes!

**Get started →**

*Note: This document is designed to help you make important decisions regarding your will. This is NOT a legal document. You still need to document your wishes in a legal will using a platform like Willful.*

Willful is not a law firm and does not provide any legal advice. If you need legal advice for your specific matter, or if your matter is too complex to be addressed by our tools, you should consult a licensed lawyer in your area.