



LIFE KEEPING,
NOT JUST BOOKKEEPING®

Preparing to Write Your Will

Before meeting with your attorney, you may want to gather the following information:

- Pre-existing will (if one exists)
- List of assets and approximate value (include copies of any official documentation):
 - Home (s)
 - Vehicle (s)
 - Checking accounts and savings accounts
 - Stocks and bonds and other investments
 - IRAs & other retirement accounts & beneficiaries
 - Life insurance policies, who are the beneficiaries, and who pays the premiums
 - Art work and valuables (jewelry, silver, antiques)
- Debts:
 - Mortgage(s)
 - Credit cards
 - Other loans
- Family and Other Beneficiaries:
 - Name of current or former spouse(s).
 - Date and place of divorce or separation from spouse
 - Names and birthdates of all your children, whether or not they are still living
 - Names of parents, whether or not they are still living
 - Names of brothers and sisters, whether or not they are still living
 - If you are single with no children or grandchildren, siblings or nieces and nephews, then the names of cousins and cousins' children will be helpful to the attorney
 - Alternate Family Members – name of companion
 - Copy of an agreement or contract with that person about the ownership or disposition of your property, if there is one
- Beneficiaries:
 - Who do you want to receive what?
 - Beneficiaries' full names, addresses and other contact information, a Social Security number, and the birth certificate or adoption papers for any minor children.
 - Do trusts need to be set up for distributions? prior to what age?
 - Are any of your beneficiaries on Medicaid or SSI and need for your bequests to them to go into a special needs trust?
- Executor and back up/Guardians for Children/Trustees for Trusts
 - Choose a primary person and then choose someone as back up
 - Contact information for executors of will, guardians for your children, trustees for any trusts (names, addresses and phone numbers).

NEW YORK: 136 Madison Avenue, 6th Floor, New York, NY 10016 T: (212) 987-1427

CALIFORNIA: 711 East Walnut St., Ste. 108, Pasadena, CA 91101 T: (626) 395-7572

www.eddyandschein.com