

## Things To Consider When Making A Will

- **Assets:** Make a list of everything you own, including property and assets, and how you want them distributed. Not all assets pass through the will, so you should make sure your beneficiary designations are consistent with your will and estate plan.
- **Beneficiaries:** Decide who will inherit your possessions and how they will benefit. This could include money or specific items. This tends to be the part of an estate plan that requires the most thought/care.
- **Executor:** Choose someone responsible for carrying out your will and distributing your assets. This could be an estate planning attorney or a trusted individual (family or friend).
- **Guardianship:** If you have children under 18, you can include guardianship arrangements in your will to ensure they are cared for if you pass away. If you have pets, you'll also get prompted to select guardians in the event they're left parentless.
- **Final Wishes:** Understand your final wishes, such as whether you prefer to be buried or cremated. Although it's a heavy topic, it's important to ensure your final wishes are known, honored (and celebrated).
- **Witnesses:** Identify the individuals that you'd like to use as your witnesses after you've completed your estate plan. You'll want at least two trusted witnesses so they can watch you sign and date it. Your will won't go into effect until after you pass away, so you won't be around to confirm it's yours.
- **Storage:** Keep your will safe. On *LifeLegacy* you'll have a copy securely stored; however, your printed and notarized version you'll want to put in a fire-proof safe, bank vault, with your financial planner or secure location in your home that others know how to access.
- **Editing:** We get it, life changes every 12-24 months! Creating a will on *LifeLegacy* gives you the ability to edit your will. Whether you want to start fresh or edit a portion of your will due to life events, you'll have the ability on *LifeLegacy*. Your estate plan evolves with you!