My Will Planning Worksheet

A gift of clarity for the people you love.

A private question-and-answer guide to help organize your wishes for a conversation with an estate-planning attorney.

Prepared for

Date

Before you begin

Take one gentle step at a time. Leave any question blank until you feel ready.

Download the PDF before typing. Use a PDF reader that supports fillable forms, then save a private copy with your answers. You may also print a blank copy and write by hand.

Keep answers brief so they remain visible when printed; use additional pages for longer instructions. Review every page before printing.

Do not include passwords, Social Security numbers or full account numbers. Keep the completed worksheet securely and share it only with people you choose.

This worksheet does not create, replace or revoke a will. An attorney should review your choices and prepare a will that meets the requirements in your state.

1. About you

What is your full legal name?

What is your home address and county?

Which state is your permanent legal residence?

Enter your state. The resources below focus on Florida; other states have different requirements.

When are you completing this worksheet?

What is your marital status?

Select an answer

If applicable, what is your spouse's full name?

What is your branch of service, if any?

Select an answer

2. Your family and dependents

Who are your children?

List full names and whether each is an adult or minor. Include adopted children and explain any stepchildren you want included.

Who are your grandchildren, and are any minors?

Does anyone depend on you financially or need ongoing support?

Mention needs you want an attorney to consider without entering medical records.

If you have minor children, whom would you nominate as their guardian?

Include name, relationship, contact information and whether you have discussed this with them. Enter not applicable if appropriate.

Who would be your alternate guardian?

3. Who will handle your estate?

A personal representative is also called an executor. An attorney should check whether your choices qualify in your state.

Who is your first choice as personal representative?

Full name, relationship, state of residence, phone and email.

Who is your alternate personal representative?

Have you discussed these responsibilities with your choices?

Select an answer

Who is your attorney, or whom would you like to consult?

Name and contact details, if known.

4. Property and important records

Describe property and where records can be found. Leave out passwords, Social Security numbers and full account numbers.

What real estate do you own, and how is it titled?

Include your home, other properties, state, joint owners and any mortgage. Florida homestead rules may limit what a will can do.

What bank accounts, investments, vehicles, business interests or other assets should be reviewed?

List institutions or descriptions, ownership and approximate values. Use a separate secure inventory for account numbers.

Which accounts or policies have named beneficiaries or survivorship arrangements?

Retirement accounts, life insurance, payable-on-death accounts and jointly owned property may pass outside your will. Review their separate beneficiary forms.

What debts or obligations should your personal representative know about?

Where are your existing will, trusts, deeds and other important records kept?

Do you already have a will or trust?

Select an answer

5. Who should receive your property?

These are your proposed wishes for legal review. Listing a gift here does not change ownership or beneficiary forms.

Do you want to leave particular items or amounts to specific people?

For each gift, list the item or amount, recipient's full name and relationship, and an alternate recipient. Add as many entries as needed.

What special gifts would you like to leave to grandchildren?

Describe keepsakes, cash gifts or education wishes. If recipients are minors, ask your attorney about how the gifts will be managed.

Would you like to leave a gift to a charity or organization?

List its full legal name, intended gift and any conditions for review.

After debts, expenses and specific gifts, who should receive the rest of your estate?

List each person's full name and proposed percentage. Percentages should add up to 100%. State whether this is before or after any special gifts.

What distribution approach would you like your attorney to consider?

Select an answer

If a beneficiary dies before you, who should receive that person's share?

For example, their descendants, the remaining beneficiaries, or a named alternate. Explain your preference for attorney review.

5. Who should receive your property? (continued)

Are there family circumstances or proposed exclusions that need private discussion with your attorney?

Spousal rights, blended families, disabilities, trusts and family disputes may require tailored planning.

6. Other wishes and follow-up

Who should care for your pets, and what support would you like to provide?

Who should help manage your digital accounts and personal files?

List the person and where instructions are kept. Do not enter passwords.

Where is your completed Funeral and Survivor Guide kept?

Tell your family where to find it. Funeral instructions should also be shared directly with the people arranging your service.

Which other planning documents do you want to discuss?

Examples: durable power of attorney, health care surrogate, living will, advance directives and trusts. A living will concerns health care, not inheritance.

Who should know where the final signed will is kept?

What questions or unresolved decisions would you like to discuss with an attorney?

When would you like to review your plan again?

Your next gentle steps

Review your wishes

Bring this worksheet to an estate-planning attorney in your state. Ask about property ownership, beneficiary designations, dependents and the requirements for signing your final will.

Keep your family informed

Once your will is properly prepared and signed, keep the original securely and tell your personal representative where it is located. Share funeral wishes directly with the people who would arrange your service.

Return to your plans

Review your plans after major family or financial changes. If you already have a will, ask an attorney whether it should be updated.

Save and print

Save your completed PDF to a secure location. Use your PDF reader's Print command and choose All pages. Check the print preview to make sure every answer is visible. These answers are not collected by the chapter.

Further reading

The Florida Bar: Do You Have a Will?

floridabar.org/public/consumer/pamphlet011/

Chapter support: moaapalmbeach@gmail.com | moaapbm.org