

# Follow this easy, step-by-step checklist to prepare for your Willful online will.

**willful.**

## Identify key people involved

There are many important roles that you may need to fill when creating your will. Deciding who these people are in advance will make drafting your will a breeze.

### Executor and Estate Trustee

This person executes the wishes in your will, distributes funds to your beneficiaries, and can act on behalf of your business and financial interests.

### Emergency Financial Representative

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

### Emergency Medical Care Representative

A spouse, relative, or close friend with good judgement, this person will be the voice of your medical decisions if you are unable to communicate.

### Guardian(s) and Trusts

If you have any dependents such as children or pets, the guardian(s) is the person who will take care of them if you and your spouse pass away.

### Choose two witnesses

Your witnesses can be any two adults; friends, neighbors or co-workers. The witness can't be, a beneficiary of the Will, the spouse of a beneficiary or a minor.

### Choose Backups

Specifying backups, will give you peace of mind. Your initial choice may refuse the task, or be unable to act for other reasons which is why it's important to have a plan B.

## Allocate your estate

Willful makes distributing and dividing your estate easy. We've outlined some common options for you to think about.

### Single

Using Willful, you can include multiple beneficiaries such as family members or close friends.

### Couples

Leave your estate to a surviving spouse. If both you and your partner were to pass away, you can add more beneficiaries.

### Parents

If you have a child or children, you can choose to leave your estate to them.

## Optional steps

### Decide on your final wishes

Using Willful, you can outline what you would choose for your final resting place and type of ceremony you would like to have.

### Outline specific gifts

Specific gifts (Bequests) are identifiable pieces of property or monetary amounts such as cash, jewelry or family heirlooms that are gifted to individuals upon your passing.

## Create, print and sign your Will

With Willful you can easily complete your will in less than 20 minutes and your documents should be ready to print and sign. Included are detailed instructions to ensure your documents follow the legal requirements to make them official.

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.

## Come back and edit anytime with Willful

Missed something? It's okay! With Willful, you can edit and update your documents, anytime.

A will is not a one-and-done type of document. It's living and breathing and should reflect life's changes as they happen.