

WILL PREPARATION CHECKLIST – Resource only to assist in writing of will

Part 1 – Personal Information - Confidential

1.	Full Legal Name	
2.	Band Number	
3.	Address	
4.	Phone number	
5.	Occupation	
6.	Marital Status	

Part 2 – Name of Selected Executor, band number of individual if relevant and contact information,

Primary Executor Name, Address, and Phone number.		
1.		
Alternate Executor, Name, Address and Phone number.		
2.		

Part 3 – List of Assets (Land, bank accounts, house, vehicle, tools/equipment, insurance, etc)

	Name of Asset	Descriptive Information on Asset e.g. CLSR# on land, house, vehicle make, etc.
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Part 4 – Liabilities, List any loans, debts owing to others, e.g. housing, bank loan, credit card etc.

1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Part 5 - Residue beneficiary(ies) name, band number of individual if relevant and contact information, etc.
 (Residue: Remainder of property left in the estate e.g. land, after debts paid, and asset has not been gifted out).

1.		
2.		

Part 6 – Persons named in Will with address (contact information) and Band Number if relevant.

1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Part 7 – Funeral Arrangements

Funeral Service	Funeral home	Burial Arrangements

Other Comments:
