



Preparing a will

A Canadian Bar Association series supporting legal wellness

A will lets you make decisions that will be carried out after your death. If you die without a will, the laws of your province or territory will determine what happens to your assets. This checklist offers issues to keep in mind when preparing or updating your will.

- ☐ Who will you appoint to settle your estate (executor or liquidator)? Do you want to appoint a replacement in case your first choice is unable to do it?
- ☐ Who will receive your estate (beneficiaries)? Are there items like jewellery, clothing, or art that you want someone in particular to have?
- ☐ If the main beneficiaries die before you, who will you name instead to receive your estate?
- ☐ Who have you named as beneficiaries in your insurance and pension plans?
- ☐ Do you want to leave anything to a charity?
- ☐ Should anything you're leaving to your children go directly to them or be held in trust until they reach a certain age?
- ☐ If you have minor children, do you want to name a guardian or tutor?
- ☐ Do you want to include instructions about your funeral? How about other directions, such as where you would like to be buried?
- ☐ Do you need to consider estate planning? For instance, if you have a family business how do you want to pass it on?
- ☐ If you are establishing a trust, have you decided on a trustee(s)?
- ☐ Will you prepare a power of attorney or mandate for decisions about care or property if you are incapacitated?

Having a will can help protect your estate and those you care about. It is worth consulting a legal professional to guide you in creating or updating your will.

LAW. YOU. CHECK IT OUT.



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