

List of Information Needed to Complete a Will

- ❑ Beneficiaries and Heirs — names of members of family, friends, and charities to whom you want to leave properties
- ❑ Property — list property you own, any debt you have, property locations, and title owners
- ❑ Bequests — distribution of your property and assets if your beneficiaries and heirs do not outlive you
- ❑ Residuary Beneficiaries — these are people who will receive any items not specified in the will
- ❑ Burial or Cremation Instructions — any instructions pertinent to your funeral, including any special requests regarding your obituary or funeral service.

Please contact us with any questions you may have regarding this list. We may request additional information depending on your personal situation. Providing our office with complete and accurate documentation will help your transaction proceed efficiently.