

Checklist Of Things To Consider

Inventory Checklist for Last Will and Testament

1. Personal Assets
 - Jewelry, watches, collectibles, artwork, and other valuables
 - Heirlooms or sentimental items (family photos, awards, etc.)
 - Digital assets (online accounts, social media, domain names, digital photo libraries)
 - Pets and care instructions
2. Financial Assets
 - Bank accounts (checking, savings, money market, etc.)
 - Investment accounts (stocks, bonds, mutual funds)
 - Retirement accounts (401(k), IRA, pension plans)
 - Life insurance policies (beneficiary designations)
 - Debts owed to the individual (personal loans, promissory notes)
 - Cryptocurrency and access details (wallet keys, account login)
3. Real Estate and Property
 - All properties owned (homes, vacation properties, land)
 - Deeds and titles
 - Lease or rental agreements for property rented out
 - Burial plot ownership or pre-paid burial arrangements
4. Vehicles and Transport Assets
 - Cars, motorcycles, boats, and recreational vehicles
 - Ownership documents and titles
 - Service and maintenance records
5. Business Interests
 - Ownership of businesses or partnerships
 - Stock certificates or ownership agreements
 - Succession plan for business, if applicable
 - Outstanding invoices or accounts receivable
6. Intellectual Property
 - Patents, copyrights, trademarks, and royalties
 - Written works, unpublished manuscripts, or artistic creations
7. Debts and Liabilities
 - Mortgages, credit cards, personal loans
 - Outstanding medical bills or obligations
 - Any liabilities tied to cosigned loans or leases
8. Family Heirlooms and Special Requests
 - Specific items with instructions for whom they should be given
 - Instructions for handling items of sentimental value.