

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 - Written works, unpublished manuscripts, or artistic creations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

Obituary Checklist

1. Personal Information
 - Full name (including maiden name, if applicable) and any commonly known nicknames
 - Date and place of birth and death
 - Cause of death, if the family wishes to share
2. Family Details
 - Names of parents, siblings, spouse(s), children, grandchildren, and other close family members
 - Preceded in death by whom (e.g., parents, spouse, children)
 - Survived by whom (include family members and special friends)
3. Education and Career Highlights
 - Schools, degrees, and academic accomplishments
 - Career or trade highlights, notable contributions or positions held
4. Military Service
 - Branch of service, rank, and notable awards or recognitions
 - Significant deployments or service contributions
5. Community Involvement
 - Volunteer work, community organizations, or charity affiliations
 - Memberships (e.g., clubs, religious organizations, fraternal groups)
6. Hobbies and Interests
 - Personal passions, hobbies, or activities that were significant
 - Travel, cultural, or sporting interests
 - Details that reflect the individual's personality or values
7. Special Accomplishments and Honors
 - Awards, recognitions, or accomplishments
 - Any personal achievements, from sports to arts to civic contributions
8. Funeral or Memorial Service Information
 - Time, date, and location of services
 - Any preferences for donations in lieu of flowers
 - Details on how friends or family can participate
9. Memorable Stories or Quotes
 - A short anecdote or quote that captures the person's character
 - Favorite sayings or words of wisdom
10. Online Presence
 - Information on any online memorial page or social media announcement