

# HOW TO CREATE A WILL IN 10 STEPS



## Why Is This Important?

Creating a will is a crucial step in ensuring your assets are protected and your wishes are honored. Every state has specific legal requirements, so it is important to adhere to local regulations. The following steps will help you build a strong and legally valid will.

## Checklist

### Prepare Your Estate Information

Before drafting your will, take inventory of what you own and consider who should inherit it.

#### ☐ **Step 1: Determine Your Assets & Liabilities**

Before drafting your will, take inventory of what you own and what you owe. A clear list of your assets and liabilities will help ensure your estate is distributed efficiently and prevent confusion for your executor and beneficiaries

### Choose Key People For Your Will

Your will should designate individuals who will handle responsibilities after your passing.

#### ☐ **Step 2. Choose Your Beneficiaries**

Your beneficiaries are the individuals, charities, or organizations that will inherit your assets. Clearly naming them in your will ensures your estate is distributed according to your wishes and helps prevent disputes.

#### ☐ **Optional. Name a Guardian for Minor Children, If Appropriate**

If you have minor children, naming a legal guardian ensures they will be cared for by someone you trust if you pass away before they reach adulthood. Without a designated guardian, the court will decide who takes custody, which may not align with your wishes.

## Define Your Specific Wishes

### Detail how your estate should be distributed.

#### □ Step 4. Decide on Specific Bequests

In addition to naming general beneficiaries, you may want to leave specific items, financial gifts, or sentimental belongings to certain individuals or organizations. Clearly outlining these bequests in your will helps ensure your wishes are honored and reduces potential disputes.

## Draft How Your Estate Should Be Distributed

To be legally valid, your will must comply with state-specific regulations.

#### □ Step 5. Check State Requirements

Each state has specific laws regarding how a will must be signed and witnessed to be legally valid. Research the signature, witness, and notary requirements in your state to ensure your will meets all legal standards. Failing to follow these rules could result in your will being challenged or deemed invalid.

#### □ Step 6. Determine Whether You Need Professional Assistance

While a simple will can often be created using templates or online services, certain situations may require the guidance of an attorney or financial professional.

#### □ Step 7. Draft & Sign Your Will

Once you have outlined your key decisions, it is time to put them into a legally binding document. A well-drafted will ensures your wishes are clear and reduces the risk of disputes or legal challenges.

#### □ Step 8. Store Your Will Safely

A will is only useful if it can be easily located when needed. Keeping it in a secure yet accessible place ensures your executor and loved ones can carry out your wishes without unnecessary delays.

(continued)

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#### □ Step 9. Notify Key People About Your Will's Existence

Creating a will is only effective if the right people know it exists and can access it when needed. Inform your executor, trusted family members, or attorney about the location of your will and any important instructions. While you do not need to share all the details, ensuring they know how to find it will prevent confusion and delays.

### Revisit To Update Your Will

A will is only useful if it can be accessed when needed.

#### □ Step 10. Review and Update Your Will Regularly

Periodically review and update your will to reflect changes in your assets, relationships, or state laws. We suggest April 16th as an annual review.

## Related Resources

Buried in Work™ offers numerous Information Hubs, checklists, guides, articles, service provider directories, services, and products to simplify estate planning and end-of-life tasks.

Related Information Hubs: Will(s) | Estate Planning Roadmap



Information Hubs

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Checklist  
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## About Buried in Work™

Buried in Work helps individuals and families navigate estate planning, legacy organization, and end-of-life preparedness with clarity and ease. Whether you are planning ahead, managing a loved one's affairs, or seeking guidance after a loss, our resources, products, and services will help simplify the process.