Last Will & Testament Planning Worksheet

Free printable planning worksheet • NOT a legal document or software-generated form

Planning overview

Client or matter reference

Applicable state / residence

Fiduciaries

Preferred executor / personal representative

Alternate executor

Family and guardianship

Minor children or other dependents to discuss

Preferred guardian and alternate, if applicable

Proposed gifts

Specific gifts or personal property instructions

Residuary beneficiaries and distribution preferences

Attorney review

Potential conflicts, prior will, or special circumstances

Questions to resolve before drafting

Use for discussion and internal intake only. This worksheet does not create, replace or execute a will, trust, power of attorney or advance directive. Verify all content and signing requirements under applicable state law.