

Last Will & Testament

How To Checklist

Your Will is one of the most important estate planning documents that you can create. It ensures that all of your wishes regarding your estate and assets are upheld after you pass away, and protects your family from difficult legal battles. We understand that planning your estate and creating your Last Will and Testament can seem like a difficult process, but with Gentreo it is easy and affordable.

To help guide you through the process even further, we have provided you with this step-by-step guide to help you easily create your Last Will and Testament with Gentreo.

Before You Start:

1. Gather contact information for beneficiaries
2. Create a general inventory of your assets
3. Choose your Personal Representative(s)



Name Your Immediate Family

If you have a spouse or are in a domestic partnership, you can provide that information first, followed by listing any children or dependents, if you have them.



List Specific Gifts & Name Their Beneficiaries

You have the option to choose if you would like to name specific gifts in your estate, or if you would like to have everything to be divided among your beneficiaries as remaining assets. When remaining assets are divided, it is done based on the percentage which you choose, not on an item to item basis. By naming specific gifts, you can name an item to be given to a particular person or charity. For example, if you had a coin collection or a valuable piece of heirloom jewelry, and wanted these items to be given to specific individuals, you can specify that here.



Name Beneficiaries for Personal Tangible Property

Personal Tangible Property can be any physical item from a pet to a home, and can be specifically gifted to a person or a charity. It is broken up into three categories: Specific Gifts, Real Estate Gifts, and Cash Gifts. If you have anything that falls under these categories that you would like to designate to a specific beneficiary, you can do so here. Each gift will require a second choice beneficiary as well, in case your first choice is unable to receive their inheritance.



Name Beneficiaries for Non-Tangible Gifts

Non-Tangible gifts are assets that you possess but cannot be physically given to a beneficiary. This includes assets such as stocks, investments, and cryptocurrency. If you have any non-tangible gifts that you would like to transfer to a specific person, you can do so in this section, and name a second choice beneficiary for these gifts.



Express Your Wishes for Remaining Assets

Any assets that you have left after you have designated any specific gifts are grouped into your remaining assets. Remaining assets are given to beneficiaries as a percentage of your total estate, without taking specific items into consideration. If you are married, anything in your estate that is held jointly will be given to your spouse outside of the Will.

What Are Classes?

You can designate percentages of your estate to classes, which are groups of types of beneficiaries such as children or grandchildren. If you wanted the entirety of your estate to be given to one class, like your grandchildren, you can designate that here and the estate will be divided evenly among the group. Keep in mind, however, that if there was anyone within that class that you would not want to receive part of the inheritance, you would need to instead name each member of the class individually and specifically withhold the name of the person you want to exclude. When choosing beneficiaries, you will also need to choose a secondary successor to receive that percentage in the event that your first choice is unable to receive it.



Appoint Your Personal Representative

To complete your Last Will and Testament, you will need to choose a Personal Representative – also known as an executor. This is the person that will execute your Will and ensure that your wishes are carried out after you pass away, which is why you should choose someone that you can trust. Your personal representative can hire a professional to assist in this process, with the costs being covered by your estate. You can also choose a second and third choice Personal Representative to ensure that your Will can be carried out in the event that your first choice is unable to do so.



Make Your Will Official

1. Print your documents. Upon completion of the Gentreo survey for your Last Will and Testament, your documents need to be printed out and, if required in your state, taken to a notary.

2. Get your Last Will and Testament Notarized. In some states, your Last Will and Testament needs to be signed in front of a witness and/or notary in order for it to be legally binding. This can be done in a variety of ways, though it is important to check which criteria are required by your state. For example, some states allow remote online notarization, however the majority of states do not.

[Click Here](#) to learn about remote online notarization laws in each state.

3. Upload the completed documents to your Gentreo Digital Family Vault. Uploading your signed Last Will and Testament to the Gentreo Digital Family Vault allows you to access, edit, and share your document any time, and ensures that it is ready when you need it most. With the Gentreo Digital Family Vault, everyone knows where to turn in the event of an emergency and instant access is always just a few clicks away.

4. Share documents with your loved ones. By providing your loved ones with access to your Last Will and Testament through your Gentreo Digital Family Vault, you ensure that they have instant access in the event of an emergency. You wouldn't want to put your wishes at risk because your family cannot access the necessary documentation.

5. Update your documents as needed, when life circumstances change, live events happen, or laws in your state change. Gentreo is with you every step of the way.

Congratulations, you have completed your Last Will and Testament!