

WILL ORGANIZATION CHECKLIST

Things you should put in a Will:

- An Executor (who will administer your estate, take care of business details)
- An Alternate Executor (in case the Executor can't or won't act in that capacity)
- Guardian for your children under age 18
- Consider all classes of Beneficiaries to be included (ex.: children, a specific charity)*
- How much each individual, club, charity, etc. is to receive (percentage or fraction terms are best)
- Distribution of chattels where direct conveyance is important (ex: mineral rights)
- Alternate Beneficiary(s), who benefit if someone in the first group of Beneficiaries is not alive
- If responsible for adult or minor children, a trust or other provision for maintenance

Things better put in a letter stored with the Will:

- Individuals that you would like to see get specific personal effects
- Funeral and burial preferences, service order and participants, grave plot location
- List of assets and their location (ex.: RRSPs, shares, bank accounts, life insurance, mineral rights, valuable collections, etc.)
- Contact information for your accountant

Besides offsetting taxes, including God's Church in your Will allows you to proclaim that for you, God is always part of the equation.



To book an appointment or for more information, contact:
Lynn McDowell, CSPG
Director



* All your children may benefit as a class, but name step or adopted children to avoid confusion; you may exclude some by name. Include the legal name and registration number of any included charities-example: **The Alberta Conference of the Seventh-day Adventist Church, charitable registration #10669-3047RR0001.**

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