



WILL REVIEW CHECKLIST

If you have any questions about writing or updating your Will, contact Joshua Jackson
Email Joshua at JJackson@barrllp.com or
Call him at 780-990-0941

IS YOUR CURRENT EXECUTOR THE RIGHT CHOICE? YES NO

Is your Executor still able to act? Has anything happened to affect their capacity?	<input type="checkbox"/>	<input type="checkbox"/>
Are they still willing to act as your Executor?	<input type="checkbox"/>	<input type="checkbox"/>
Will they have the time to act? It takes approximately a year to close an estate.	<input type="checkbox"/>	<input type="checkbox"/>
Do you trust them and still want them to act as your Executor? Is there someone else you prefer?	<input type="checkbox"/>	<input type="checkbox"/>
Did you name more than 1 person as your Executor in your past Will and want to remove one?	<input type="checkbox"/>	<input type="checkbox"/>

HAVE YOU HAD AN MAJOR LIFE CHANGES? YES NO

Have you recently been married or divorced? Any major changes to your relationship?	<input type="checkbox"/>	<input type="checkbox"/>
Have any of your beneficiaries passed away?	<input type="checkbox"/>	<input type="checkbox"/>
Do you wish to remove any beneficiaries from your Will?	<input type="checkbox"/>	<input type="checkbox"/>
Do you wish to include any new beneficiaries - children? grandchildren? daughter/son in laws?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to add or remove any gifts that were indicated in your current Will?	<input type="checkbox"/>	<input type="checkbox"/>
Are you happy with the legacy that you are leaving behind?	<input type="checkbox"/>	<input type="checkbox"/>

OTHER YES NO

Do you want to provide something special for your grandchildren or a minor aged person?	<input type="checkbox"/>	<input type="checkbox"/>
Do you feel comfortable with how your current Will was written?	<input type="checkbox"/>	<input type="checkbox"/>
Have you written on your Will or made any manual changes to it?	<input type="checkbox"/>	<input type="checkbox"/>