

Last Will and Testament Checklist

Action Checklist — ClearLegalTips.com (2026)

A simple will must be executed correctly to be valid. Work through each step before anyone picks up a pen.

People

- ☐ Listed all family members and every child, including from prior relationships
- ☐ Named an executor and a living alternate executor
- ☐ Named a guardian and alternate for any minor children Gifts
- ☐ Listed specific bequests with each beneficiary and relationship
- ☐ Named the residuary beneficiary who catches everything not specifically given
- ☐ Added alternates in case a beneficiary predeceases you Execute (Critical)
- ☐ Signed the will in front of two disinterested adult witnesses in one sitting
- ☐ Both witnesses signed in your presence and in each other's presence
- ☐ Completed the self-proving affidavit before a notary where your state uses one (not needed in California) After Signing
- ☐ Updated beneficiary forms on 401(k), IRA, life insurance, and POD accounts the same day
- ☐ Stored the signed original somewhere safe and told your executor where it is
- ☐ Set a reminder to review the will after any marriage, divorce, birth, death, or move, and every 3–5 years

INSTRUCTIONS FOR USE

This checklist supports the Last Will and Testament template. A will directs probate; it does not skip it and does not control non-probate assets, which follow their beneficiary forms. Laws vary by state and change over time — this resource is general information only, not legal advice. Consult a licensed attorney for guidance on your situation.