

WILLS checklist

- ☐ Testator's Full name and Aliases (with 2 forms of ID)
- ☐ Testator's Occupation
- ☐ Testator's Address (with proof of address)
- ☐ Full Names and copies of IDs of two Executors
- ☐ Proper Addresses for two Executors, proof of address to be included
- ☐ List all properties with proper addresses, include property descriptions and any recent valuation reports (up to 2 years)
- ☐ List all (including account numbers, Companies and addresses of home branches etc):
 - Insurance plans,
 - Pension plans,
 - Shareholdings,
 - Investments,
 - Bank, UTC and Credit union accounts

to be included in the Will

- ☐ Name each person (beneficiary) with each person's proper, legal name and correct address, to whom each item will be bequeathed, be specific include adequate descriptions of items e.g. Jewels etc.
- ☐ Suggest two witnesses, give their names, occupations and addresses as well as contact info. IDs for each.
- ☐ Include any other requests/conditions