



Last Will & Testament Preparation Checklist

- The page with the client's signature on it should have at least a few lines of the text of the will on it. (This means you might need to add some spacing. It's okay if there is some blank space at the bottom of the page before the page with the client's signature on it.)
- The witness' signature page should take up only one page – the last numbered page.
- The witness' signature page has a date within the paragraph above the signatures that can easily be missed during execution.
- Article headings are numerically sequential but if one is deleted, they will not auto set. They will need to be changed manually.
- For clauses FOURTH, FIFTH, and SEVENTH, if you delete sub-clause (B), go back and delete the sub-clause lettering "(A)" and leave only the paragraph text.
- In-text article references start with a capital letter, the rest of the word lowercase, unbold, unbracketed, and correspond accurately.
- Pronoun designations are lowercase, unbold, unbracketed, and accurately designated.
- Any bold and bracketed notes to the drafter should be deleted prior to distributing draft to the client.
- Double-check names and addresses against the blurb/summary and client IDs.
- Executions versions printed single sided with watermark removed.
- Last Will & Testament stapled together with Affidavit of attesting witness and an Affidavit of Translation if translation/interpretation was provided for your client.
- Ask your client these questions just prior to them signing the Last Will & Testament:
 - 1. What is this document? 2. Whose Will is this? 3. Have you read this Will?
 - 4. Does this Will express your wishes? 5. Would you like for [Witness 1] and [Witness 2] to witness your Will?
- Best practice: staple the Last Will & Testament before signing. Why?
 - Prevents pages from getting out of order.
 - Prevents courts from thinking that the Will was tampered with.
 - If signed prior to stapling and the staple snags or otherwise must be removed and re-stapled, the Will must be re-printed and re-signed.
- Tell the client not to put their Will in a safe deposit box because the box will be sealed at their death, and it will be very difficult to access the Will.