

Last Will and Testament Checklist

Use this checklist to gather the family, asset, bequest, and executor details needed before drafting a Louisiana last will and testament.

1. Full name

2. Current address

3. Marital history. Example: list all marriages, the names of spouses, and whether each marriage ended by divorce, widowhood, or is still ongoing.

4. Children. Provide the full names and dates of birth for all children, whether biological or adopted.

Do any of the children have a physical or mental handicap that prevents them from taking care of themselves or managing their own affairs?

Assets and distribution

5. Immovable assets (for example: homes, land, or other real property).

Movable assets (for example: vehicles, stocks, bonds, jewelry, businesses, artwork, heirlooms, or bank accounts).

6. Bequests. Who do you want your property to go to and in what amounts? Include each person's full name and relationship to you.

This can be general or specific. Example: "I leave all my property to my spouse," or "I leave the home to my spouse, the boat to my son, and the jewelry to my daughter."

If the first heir predeceases you, who is next in line to receive the property?

Executor or administrator

7. Who is the trustworthy person you wish to name as executor or administrator to manage your estate? Provide their full name, address, and relationship to you.

If the first person named is unable or unwilling to serve, who should take their place? Provide their full name, address, and relationship to you.