

# CREATE A WILL CHECKLIST

Everything You Need to Prepare Before  
Drafting Your Will

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Created for Create a Will Month by The  
DeVries Law Firm, P.A.

# Florida Will-Making Checklist

Everything You Need to Prepare Before Drafting Your Will

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This checklist is provided for informational purposes only and does not constitute legal advice. Estate planning laws vary by state and individual circumstances. To ensure your will complies with Florida law and accurately reflects your wishes, consult with a qualified estate planning attorney. The DeVries Law Firm, P.A. is available to assist you with personalized legal guidance. The information provided in this checklist and related materials is for general informational purposes only and does not constitute legal advice. Downloading or using this checklist does not create an attorney-client relationship between you and The DeVries Law Firm, P.A. or any of its attorneys. Confidential information should only be shared during a formal attorney-client meeting.

## Why Create a Will Month Matters

August is recognized nationwide as **Create a Will Month**, a dedicated time to encourage everyone to take an important step toward protecting their loved ones and assets through proper estate planning. Having a valid will is one of the most effective ways to ensure your wishes are honored, your family is cared for, and your assets are distributed according to your intentions, not by default state laws.

Many people delay making a will because they feel overwhelmed or uncertain about where to start. This checklist is designed to simplify that process by helping you organize your thoughts, gather necessary information, and prepare for a smooth estate planning experience.

Whether you're creating your first will or updating an existing one, now is the perfect time to take action. Protect your legacy and bring peace of mind to yourself and those you care about.

### **Take the Next Step Today**

Use this guide to get organized, then schedule a free 15-minute consultation with our experienced Florida estate planning team. We will guide you through every step to ensure your will is legally sound and tailored to your needs.

[Book Your Free Consultation Now](#) or call us directly at **+1 904 906 8884**.

# Comprehensive Checklist to Prepare for Creating Your Florida Will

## Step 1: Define Your Goals and Intentions

- What specific outcomes do you want your will to achieve?
  - Are there family members or individuals you want to prioritize or exclude?
  - Do you have any charitable organizations you wish to include as beneficiaries?
  - Do you want to specify instructions for personal belongings or sentimental items?
  - Are there particular concerns, such as blended families or special needs dependents, to address?
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## Step 2: Make a Detailed List of Assets

List all property and assets you own:

- Real estate holdings (primary residence, vacation homes, land)
  - Bank accounts (checking, savings, CDs)
  - Investment accounts (stocks, bonds, mutual funds, retirement accounts)
  - Vehicles (cars, boats, motorcycles)
  - Valuable personal property (jewelry, art, collectibles)
  - Business interests or partnerships
  - Digital assets with financial value (cryptocurrency, online accounts)
  - Life insurance policies and current beneficiaries
  - Any other tangible or intangible property of value
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## Step 3: Identify Your Beneficiaries

- Who will inherit your assets? List full names and relationships.
  - Do you want to name alternate beneficiaries if primary ones are unable or unwilling?
  - Are any beneficiaries minors, and do they require guardianship considerations?
  - Have you considered how to handle beneficiaries with special needs or circumstances?
- 

#### **Step 4: Choose Your Personal Representative (Executor)**

- Who do you trust to carry out your will's instructions?
  - Have you discussed this role with the person? Are they willing to serve?
  - Do you have an alternate executor in case your first choice is unavailable?
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#### **Step 5: Appoint Guardians for Minor Children (if applicable)**

- Who do you want to appoint as guardian(s) for your children?
  - Have you discussed this responsibility with the potential guardians?
  - Do you have alternate guardians named as backups?
  - Consider how the guardians will handle finances and day-to-day care.
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#### **Step 6: Plan for Digital Assets**

- List your online accounts, login information, and passwords.
  - Identify any digital assets with financial or sentimental value.
  - Decide how you want digital assets handled after your passing.
  - Include instructions for social media accounts, email, digital photos, and files.
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## **Step 7: Write Down Special Instructions**

- Do you have specific wishes for your funeral, burial, or memorial service?
  - Are there any personal messages or letters you want to leave to loved ones?
  - Would you like to designate specific gifts or heirlooms to particular people?
  - Do you want to include provisions for pets or charitable donations?
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## **Step 8: Review and Update Existing Documents**

- Do you already have a will or estate plan? Is it current?
  - Are your beneficiaries on insurance and retirement accounts up to date?
  - Are powers of attorney and health care directives aligned with your wishes?
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## **Step 9: Schedule a Consultation with an Estate Planning Attorney**

- Ask questions about Florida's legal requirements for wills.
  - Discuss any complex family or financial situations.
  - Confirm how to make your will legally valid and enforceable in Florida.
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## Take Control of Your Future Today

Creating a will is one of the most important steps you can take to protect your loved ones and ensure your wishes are honored. This checklist is designed to make the process easier and more manageable, but having a properly drafted will requires expert legal guidance.

If you're ready to move forward with confidence, schedule a free 15-minute consultation with our Florida estate planning team. We'll review your checklist, answer your questions, and help you create a will that provides peace of mind for you and your family.

**Don't wait, protect what matters most.**

[Schedule Your Free Consultation Today](#) or call us at **+1 904 906 8884**.