

Your last gift and final word.

Will Planning Checklist.



1. Compile a list of your assets and liabilities. Tick off as completed.

- List any land or property you own, along with locations of titles
- Life insurance policies, superannuation policies, account numbers, and login information should be listed
- Make a list of all your possessions, including motor vehicles, motorcycles, boats, caravans, and collectibles
- List all financial information, such as savings accounts and debts
- Include all information about stocks, bonds, and cryptocurrencies
- All items with sentimental value or valuable possessions should be listed.

2. Consider who to appoint as your executors and/or guardians.

- Your Executor is responsible for administering your estate and carrying out your final wishes
- If you have minor children (under 18), choose the person who will be their Guardian
- It is important to consider someone to take care of your furry friends.

3. Nominate your beneficiaries and divide your estate.

- Include name(s) and last known address(es) of people you wish to benefit from your estate
- Families, friends, and charitable organisations that have made a positive impact on your life can be beneficiaries
- Select your beneficiaries and specify how your estate should be divided
- Give specific instructions on what you want the beneficiary to receive
- Are you interested in leaving a legacy to a charity in your Will? There is a lot of desire among people to leave a legacy.



Uniting is the community services organisation of the Uniting Church in Victoria and Tasmania.



Uniting

4. Would you consider leaving a gift in your Will to Uniting Vic.Tas?

- We strive to make a difference for individuals, families, and communities
- The legacy you leave behind helps us to support people in their time of need. Even a small gift of 1% of your estate can make a big difference to those in our community who are most vulnerable.
- Don't let tomorrow pass by without doing something good today for your family and community
- When you have provided for your loved ones, please consider leaving a gift in your Will to Uniting Vic.Tas.

5. Complete your Will.

- Visit your solicitor and write your Will
- Create your own Will online. Uniting has partnered with Safewill - visit our website for details
- Throughout the process, make sure you answer all questions.

6. Review and sign your Will.

It is necessary to meet certain requirements for a last will and testament to be valid, including:

- Age requirement: 18 or older
- Two independent witnesses have properly executed, signed, and witnessed the Will
- To fulfill your wishes, make sure your executor has a copy of your Will
- Update your Will every few years to reflect changes in your life (marriage, children, divorce, retirement, investments, real estate, etc.)
- If you've included Uniting in your Will, please inform us. We value your support and want to acknowledge your dedication in your lifetime.

A well-written Will can give your family and friends peace of mind. Prior to seeking legal advice, it is a good idea to discuss your intentions with your loved ones or a trusted friend.

For more information about a legacy to believe in, please visit our website or get in touch with Program Lead, Gift in Wills.

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