

BC will-preparation worksheet

Preparation only. This is not a will or legal advice. Do not sign it as a will.
Keep your completed copy private. No email or upload to WiseWill is needed.

1. People to discuss

Who would you consider as executor, and as a backup? Have you asked them? If you have children who may need a guardian, note the people you want to discuss with your adviser. These notes do not appoint anyone.

2. Your family and questions

List relationships or responsibilities your adviser should understand: a spouse or partner, children, dependants, a previous relationship, or someone receiving disability benefits. Use initials if you prefer. Leave sensitive details for a private conversation.

BC will-preparation worksheet

Preparation only. This is not a will or legal advice. Do not sign it as a will.
Keep your completed copy private. No email or upload to WiseWill is needed.

3. Assets, debts and existing arrangements

Make a broad list of property, savings, investments, insurance, business interests and debts. Note jointly held assets and any existing beneficiary designations so your adviser can check them. Do not put passwords, account numbers or identity numbers on this worksheet.

4. Documents to locate

Find your current will, any power of attorney or representation agreement, relevant ownership records, beneficiary-designation information and any separation or family agreements. Note where each is kept. Ask your adviser which documents they need and how to share them securely.

BC will-preparation worksheet

Preparation only. This is not a will or legal advice. Do not sign it as a will.

Keep your completed copy private. No email or upload to WiseWill is needed.

5. Compare the full quote

Ask what documents and advice the fee includes, whether taxes and signing appointments are extra, how many revisions are included, and what future updates cost. Tell the office about step-free access, large print, interpretation, extra time or other adjustments you need.

6. Your next appointment

Write three questions and one next step. Choose an adviser, request a written quote, or gather a missing document. Confirm how the final documents will be signed, witnessed and stored. Keep this completed worksheet private; do not send it to WiseWill.
