

Testament Execution Checklist

Date: _____

To: [Executor's Name]

From: [Testator's Name]

Checklist Items:

- Confirm all testamentary documents are in order.
- Verify witness signatures on the will.
- Ensure that all provisions of the will are clear and enforceable.
- Collect necessary identification for all involved parties.
- Notify beneficiaries about the testament and their entitlements.
- Review any pre-existing trusts or insurance policies.
- Arrange for the storage of the will in a secure location.
- Schedule a meeting with an attorney, if necessary.

Important Contacts:

Attorney: _____ Phone: _____

Financial Advisor: _____ Phone: _____

Key Beneficiaries: _____ Phone: _____

Notes:
