

epicwill

Will Prep Guide

Everything you need to know to create your online Will in 5 minutes.



Introduction

We get it. Piecing together your Will can be an intimidating undertaking—but it doesn't have to be. We understand how important your Will is—no matter if you're just turning 18, married or single, with or without children, have assets or no major assets—which is why we're here to help you get started today!

To walk you through the process of preparing a Will, we've provided an interactive resource for you to use as you start thinking about what to include in your Will, and gather the necessary information ahead of time.

If you have a complex familial situation, divorced, have children from other marriages, have property you own in multiple states, or have over a million-dollar net worth, you really should connect with an attorney to talk through your specific situation.

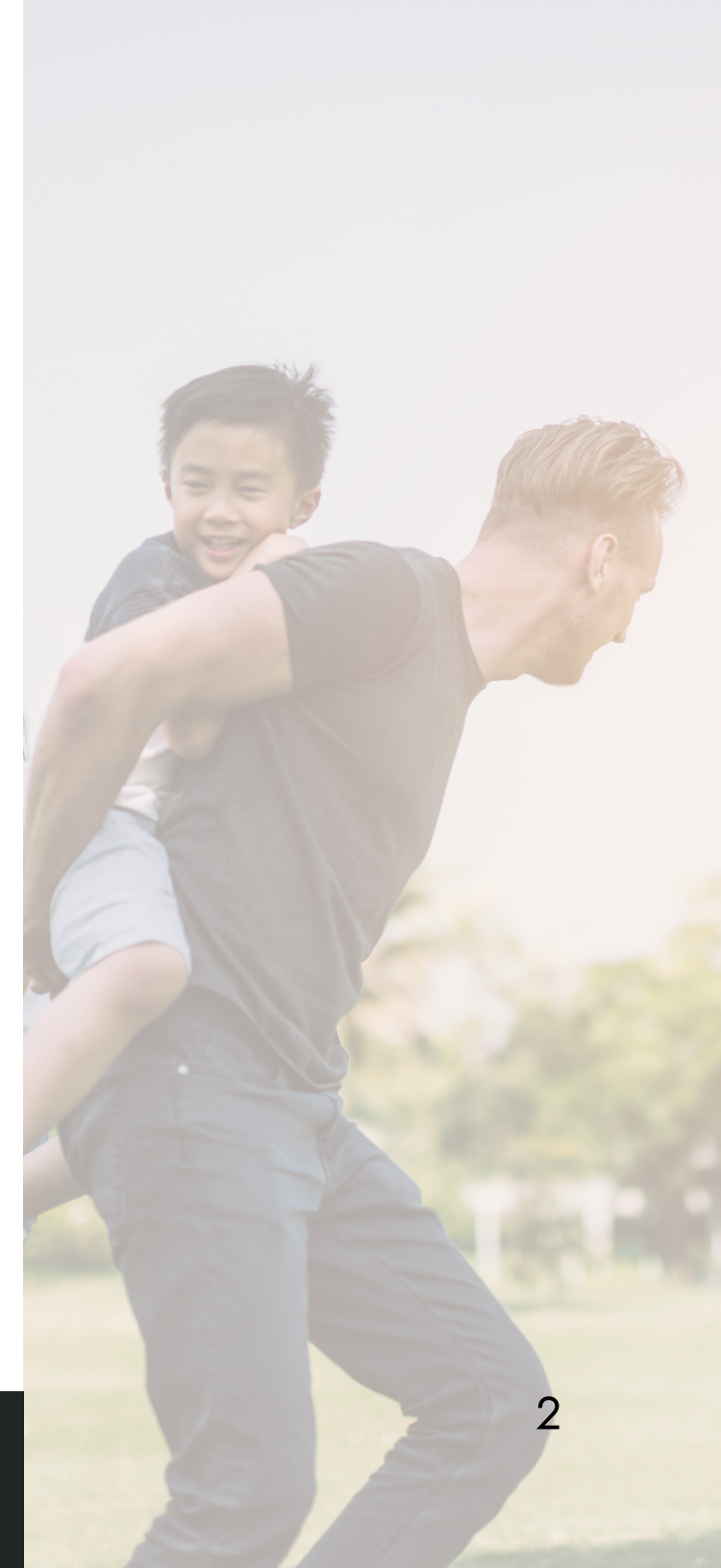
But, if you're single, married, and/or have young children who do not fit the description above, then we are here to help you!

With this comprehensive guide, you can feel confident that everything is being taken care of. We've included definitions and explanations of the different areas of your Will, a checklist for all the information you'll need to gather in advance, an editable notebook for you to gather your notes in one location, and information for the next steps to take after you've collected all your information.

These are some big life decisions, so if there are some areas you're unsure about, just know that you can always come back later after you've had some time to talk to your loved ones and think about what's best.

Let's get started personalizing your Will Preparation Guide.

***Epic Will is a resource to help you complete your Will following your state's specific laws, but we are not attorneys who can offer you legal advice about your specific situation.**



Your Family

First, you need to identify your spouse and children if you have them, or just yourself. Then, if you have children under 18 you'll need to nominate a guardian. A legal guardian is someone who will have custody of your children and has the authority to make decisions about their well-being in case something happens to both parents. While the reality of this may be tough to imagine, it's important that you name someone you love and trust, along with a back-up to that person, to care for your children should the unimaginable happen.

Relation	First Name	Middle Name	Last Name	Date of Birth	Address	Phone Number
Spouse						
Child 1						
Child 2						
Child 3						
Primary Guardian		N/A		N/A		
Alternate Guardian		N/A		N/A		

The Difference Between “Co” and “Alternate”

You will see this mainly with your Representative and Agents below. There are no right or wrong decisions. Also, as you'll notice above, there is no “Co-Guardian”— that's because you cannot split children between two different people.

Alternate, or Successor — means your second choice will be a backup to your primary choice if the primary can not or does not want to fulfill their obligations.

Co — means you want the two individuals you choose to make decisions TOGETHER.

Your Representative(s) and Agent(s)

Personal Representative

Your Last Will is what directs the distribution of your assets after you pass. In a Will, the person handling/executing your affairs is your Personal Representative (sometimes known as an Executor).

Health Care Power of Attorney (POA)

Your Health Care POA is the person who makes decisions about your health care to your doctors on your behalf and is given instructions about what medical treatment you want.

Advance Directive or Living Will

Your Advance Directive or Living Will addresses exactly what you want to be done with your body and life in the event you can't speak for yourself. This is where you'll determine your Power of Attorneys/Agents.

Financial Power of Attorney (POA)

Your Financial POA is the person who makes decisions about your financial affairs and is given the ability to pay your bills, access your account, pay your taxes, buy and sell investments and real estate, or any other financial transactions that protect your assets on your behalf.

Representative*	Name	Relation	Phone Number	Address	Email
Primary Personal Representative					
Alternate/Co-Personal Representative					
Health Care Primary Agent					
Health Care Alternate or Co-Agent					
Financial Primary Agent					
Financial Alternate or Co-Agent					
**					
**					

*Your Personal Representatives and Power of Attorneys can all be the same person/people, they are just referenced in different ways. Your Primary and Alternates CANNOT be the same person.

**Certain states require you to nominate additional roles/responsibilities. To see if this applies to you, reference our [FAQ](#) page.

Specific Gifts

This section and the section on page 6 follow the naming of your Representatives. This is where you can leave specific things you own to specific people in your Will.

Specific gifts, such as gifts of cash, bank accounts, etc., and whom you wish to leave them to can be addressed in the "Specific Gifts" section in your online Will.

Think about it this way: Do you want to leave cash gifts to your local church, your Alma Mater, or a dear friend or family member, etc.?

Specific Gifts Example:

Asset:	\$10,000
Leave to:	Alma Mater University
Address:	123 Street Avenue, Somewhere, CO 56789
Phone number:	555-555-5555
Email:	AlmaMater@University.com

Gather a list of your specific gifts



Personal Property

Your personal property, such as your dog, car, clothes, Harry Potter DVD collection, as well as other "tangible" items, will be noted in a section called the Personal Property Memorandum

Think about it this way: Whom do you want to take care of your dog or cat if you were to pass? Is there a charity you want to give your car to? Is there a certain friend that you want to have your clothes, or cookware, or favorite watch given to?

Your personal property memorandum is a separate printout document included in the final download of all your forms after creating your Will. This makes it easier to create a long list of your items and whom you want to leave them to without having to redo your Will every time you make an edit. Just be sure to sign your document to make it legally binding.

Personal Property Example:

Asset:	My Labradoodle – Larry
Leave to:	Angela Stevens
Address:	456 Street Avenue, Somewhere, CO 56789
Phone number:	000-000-0000
Email:	Angela@emaildomain.com

Gather a list of your personal property

Residual Estate and Beneficiaries

Outside of the specific gifts and your personal property, anything and everything else is called your Residual Estate. This section is where you will identify which Beneficiaries you want to leave these items to.

Below are a few examples of how this might go:

Married and no children

You might leave everything to your spouse first and then to someone in your family, or close friends, or whomever you choose.

Married with minor children

You could leave everything to your spouse as the Primary Beneficiary and then your children as the backup. You would then need to identify what age you want your children to receive their inheritance.

Married with adult children

Similar to minor children, you can choose to have your spouse as the Primary Beneficiary and your adult children as the backup.



Not married and no children

Maybe you choose someone in your family, a close friend, or a charity to give your items to.

Not married with minor children

Your Executor will hold your estate in trust until your children have reached the age you've selected for them to receive their inheritance.

Not married with adult children

Here we ask if you want your adult children to be the Beneficiaries of your Residual Estate. You can decide to leave everything to them and then name a backup Beneficiary.

NOTE: If you have a life insurance policy, the Beneficiaries you have identified there are already covered by that policy. This is everything outside of an insurance policy.

Residual Estate and Beneficiaries ctd.

There's no right or wrong way to do this. It's 100% based on your specific situation and what you want to do. Nevertheless, follow this template for who you want to name as your Beneficiaries.

Example: Married with no children

Primary Beneficiary:	My Spouse – Joe Smith
Alternate Beneficiary:	Angela Stevens
Alts. Address:	123 Street Avenue, Somewhere, CO 56789
Alts. Phone Number:	555-555-5555
Alts. Email:	Angela@gmail.com
Alts. % of Estate:	100%

Fill in your Beneficiary's information:

Primary Beneficiary:	
Alternate Beneficiary:	
Alts. Address:	
Alts. Phone Number:	
Alts. Email:	
Alts. % of Estate:	

Wipeout Clause

After you name all your Beneficiaries, you then need to identify who you want to leave everything to in the catastrophic and unlikely event that all your Beneficiaries predecease you. That can be nearest living relatives, individuals, or a charity/organization.



Health Decisions

This part you need to think and talk through with your spouse, parents, loved ones, or an attorney if you're really confused.

You will be making decisions now about how you want your health care to be handled when you can no longer speak for yourself. If you're in an accident and unconscious, this is where you tell your family and doctors what you want for your life.

We dive into more detail on each of these statements within the Will and on our site, but you need to be prepared to make these decisions and have those discussions with those you want to be involved.

In this section, you'll be making the following decisions:

1. Do you want to receive life-sustaining treatment for the following?

- Diagnosed with a terminal illness, disease, or injury.
- In the event you are in an end-stage condition.
- Permanently unconscious or in a vegetative state.
- In a state of permanent confusion.
- In the event you are unable to talk, communicate clearly, or move without assistance.

2. Do you want to receive pain relief treatment?

3. Do you want to donate organs or any part of your body after death?



Will Preparation Checklist

To recap, here is a basic list of everything you need to start creating your Epic Will.

- Spouse
- Children
- Guardian (Last Will)
- Alternate Guardian (Last Will)
- Primary Personal Representative (Last Will)
- Alternate/Co-Personal Representative (Last Will)
- Health Care Primary Agent (Advance Directive/Living Will & Health Care POA)
- Health Care Alternate/Co-Agent (Advance Directive/Living Will & Health Care POA)
- Financial Primary Agent (Financial POA)
- Financial Alternate/Co-Agent (Financial POA)
- Specific gifts (Last Will)
- Personal property (Personal property memorandum)
- Beneficiaries – Residual Estate (Last Will)
- Health care decisions
 - Do you want to receive life-sustaining treatments?
 - Do you want to receive pain medication?
 - Do you want to donate organs?





Signing

Congrats! You've gathered everything you need to start creating a Will. At this point, you'll want to head to EpicWill.com to get everything documented and saved in your online Will, but you aren't done yet. Having everything documented and saved means absolutely nothing if you do not get your documents notarized and signed by two witnesses.

Here are your next steps:

Step 1:

Identify what county you will be signing your documents in.

Step 2:

Make an appointment with a notary in that county. You can typically find one at your local bank or UPS store.

Step 3:

Find two (2) witnesses to join you and the notary during your appointment to witness and sign with you. These witnesses cannot be someone you have identified as a Beneficiary in your Will.

Step 4:

In some cases, your state will require your Personal Representative or Agent to sign as well. The instruction page we provide that comes with your completed documents will highlight any additional state-specific requirements if it is needed.

We hope this guide was helpful as you start creating your Will.

Start Your Epic Will

Here at Epic Will, we've thought of everything so you don't have to. We've created a quick and simple way to start preparing your Will online in as little as 5 minutes so you can protect your family, leave your legacy, and live with confidence knowing your final wishes are documented and legally binding.

Create your legal Will online at EpicWill.com in just five minutes from the comfort of your home.

1

Choose a package

Answer a few questions and we'll help you determine which estate plan is best for you.

2

Simple instructions

We'll walk you through the different areas of your Will and what information to include.

3

Sign & notarize

Bring your Will and two witnesses to a notary to make the documents legal.

Because who you love and what you've earned deserve to be protected.

[START MY WILL](#)