

Will Info: Read after Your Appointment

INSTRUCTIONS FOR WILL SIGNING, CHANGING INSURANCE BENEFICIARIES OF A CHILDREN' S TRUST, AND ADVICE ABOUT YOUR WILL

- 1. Will signings at the Legal Assistance Office, DLI, POM are typically by appointment only.** We normally can provide witnesses. Arrive five to ten minutes early (if you have already proofread your will) so the notary can copy the required information from your ID CARD into her California notary journal. The new ID CARD has no signature so bring a card that does, e.g. driver's license or passport. The notary will ultimately administer an oath to the will signers. Parking is scarce so please plan accordingly. There are 3 curbside parking spaces reserved for clients next to the building
- 2.** If you are not going to arrive on time, please be considerate and reschedule ahead of time. Others signing their wills should not have to wait. Our phone number is 242-5083.
- 3.** Normally, you will not have had the opportunity to proofread your will at the time the attorney prepared it. Unread wills may be reviewed and signed between 0800 and 1600 by appointment. You **MUST** review the will prior to its execution. Allow the attorney sufficient time to make corrections or changes you want made prior to your signing. The procedure takes approximately 10 to 20-minutes. Please bring your own pen.
- 4.** If you included a testamentary trust for your children in your will, remember to change the secondary (contingent) beneficiaries on your Servicemen' s Group Life Insurance (SGLI), commercial life insurance policies, IRAs, and Thrift Savings Plan so they will pay out to "MY TRUSTEE TO FUND A TRUST ESTABLISHED FOR MY CHILDREN UNDER MY WILL".
- 5.** The will provided you is the original. This office does not keep or maintain a copy although you may wish to make and keep copies for your personal files or give to whomever you wish. Only the original has legal effect and should be kept in a place where it is protected against, fire theft, damage or other loss. If you decide to use a safety deposit box at a bank, ask your bank whether a court order is required to open the box after your death. Some states have laws requiring the box be sealed upon the death of the owner. This may occur even if only one of the two joint owners dies. You may wish to mail your original will to your alternate executor or to a close family member for safekeeping. In any event, the executors and primary beneficiaries should be told where the original is kept and have access to it upon your death.
- 6.** You should prepare an inventory of all your real and personal property. This inventory should be kept with your will, giving a description and location of all your property. This inventory will greatly assist your executor in settling your estate. This listing should include life insurance policies, bank accounts, stocks, bonds, real estate, business interests and personal property. This inventory should be kept up to date and checked at regular intervals. You may wish to leave a letter of instruction for your executor giving additional guidance as to how you want any items of personal property distributed. This letter of instruction is not a substitute or replacement for a will; its only legal effect is to provide assistance to your executor.
- 7.** Now that your new will has been executed, you should destroy your old will and any copies immediately. Your new will remains effective until destroyed or otherwise nullified by your clear and express action.
- 8.** Your will has been drafted on the basis of your present intentions. There are several reasons to review your will including: (a) the death of any person named in your will; (b) marriage or divorce; (c) a substantial change in your financial condition; (d) the mental or physical disability of someone in your will; (e) change in executor, trustee, or guardian; (f) any event that influences how you want your property distributed upon your death.
- 9. DO NOT try to change your will by crossing out or adding words or additional marks.** Any such alterations may invalidate the entire document. On a separate piece of paper, note any changes you want and bring to your next appointment to have a new will prepared

