



Will Writing Toolkit

Getting Ready to Write your Will

LegalWills
CANADA



Make a Will. Make a Difference.

THIS FREE TOOLKIT HELPS YOU DO BOTH.

We know writing a Will can feel overwhelming, even if you want to get it done it's easy to put off until "someday". Maybe you're not sure where to start. Maybe it feels complicated or emotional. Or maybe life's just been busy (we get it). That's exactly why we created this toolkit.

Whether you're writing your first Will or updating an old one, this guide is here to walk you through the process, clearly, calmly, and without pressure.

INSIDE YOU'LL FIND:

- ✓ A **Will Information Worksheet** to help you organize your thoughts before you begin
- ✓ A **simple checklist** so you know what decisions to make and what steps to take
- ✓ Answers to the most common **questions** (*including the ones you might feel awkward asking*)
- ✓ A breakdown of how you can **support causes you care about** through your Will
- ✓ A look at **what's involved in writing your Will** online and why we've been **trusted by over 2M Canadians** for over 25 years

We believe that estate planning is an act of both love and legacy.

This toolkit is designed to help you approach it with clarity and confidence.

ALREADY FEELING PREPARED TO GET STARTED?

Use promo code **TOOLKIT10** to **SAVE 10%** on any of our services at LegalWills.ca

Is an Online Will Right for You?

Let us help you assess if this is the right option for your situation.

This toolkit is designed to help you prepare your documentation and gather your thoughts before creating your Will and Powers of Attorney using LegalWills, an online Will platform.

For many people, an online Will can be a convenient, affordable, and effective way to ensure their wishes are documented. However, online wills are best suited for straightforward personal and family situations. If your circumstances are more complex, it's important to seek advice from a lawyer who can guide you through the process and ensure your documents properly reflect your intentions.

YOU SHOULD CONSIDER CONSULTING WITH A LAWYER IF YOU:

-  Are separated, divorced, or in a blended family situation, and have questions about your obligations or responsibilities to your ex-spouse post-death.
-  Need to establish complex guardianship or trust arrangements for minor children or dependants
-  Own a business, farm, or have multiple or high-value assets.
-  Wish to exclude a spouse or child from your Will.
-  Have a beneficiary with a disability, special needs, or who receives government benefits.
-  Want to discuss and/or create detailed estate, tax, or succession planning strategies.

If any of the above apply to you, speaking with a lawyer will ensure your documents reflect your full intentions. For everyone else, this toolkit will help you get organized and feel confident before starting your online Will and Powers of Attorney!

FIRST THING'S FIRST:

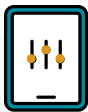
Why Does Having a Will Even Matter?

If you've ever thought, *"Do I really need a Will?"* you're not alone. Maybe you think you're too young, or don't own enough, or you're not "at that stage of life" yet. **But here's the truth:**

If you're an adult, you need a Will. Full stop.

It doesn't matter if you don't have kids, a house, or any savings. If you have any possessions, accounts, pets, or people you care about, you need to document your wishes. **And in today's digital world, that's even more important.**

Most of us have online accounts, photos, messages, cloud storage, or even small investments or side hustles. These are all part of your estate and without a Will, they can be lost or mismanaged.

HERE'S WHAT A WILL HELPS WITH:**PUTS YOU IN CONTROL**

Without a Will, provincial laws decide what happens to your stuff and who's in charge.

**PROTECTS YOUR LOVED ONES.**

A clear Will saves your family from added stress and legal confusion.

**LETS YOU LEAVE A LEGACY**

Whether it's a meaningful gift or support for a cause you believe in, your Will helps carry that forward.

**INCLUDES YOUR DIGITAL LIFE**

From emails to social media to crypto, your online presence deserves a plan, too.

And here's the good news, in a world where so much feels out of our control, from rising costs to global uncertainty, **your Will is something you can control.** You get to decide what happens to your belongings, your digital life, and the legacy you leave behind. And it's easier than ever to get started. Online tools have made the process simple, accessible, and completely in your hands – no office visits needed, no legal jargon. This toolkit was created to guide you through it all, step by step, at your own pace.

Let's break down the barriers together and get you in control of your estate, your wishes, and your future. You've got this.

What You *Actually* Need to Get Started

Before we go any further, let's get one thing clear: **You do *not* need to have it all figured out.**

You don't need to know every detail of your finances.
You don't need to make decisions for the rest of your life.
You don't even need to have a full list of your belongings.

HERE'S WHAT YOU DO NEED, THE REAL ESSENTIALS:

The Bare Minimum Checklist

- ☐ **Who will carry out your wishes?**
This is your **executor**: the person who makes sure everything in your Will happens the way you want it to.
- ☐ **Who will receive your assets?**
This could be one person or a few, it's completely up to you. *(You can also leave specific items to specific people if you want.)*
- ☐ **If you have children, who will care for them?** This is your **guardian**.
You should also name a backup, just in case.
- ☐ **Have a cause you care about?**
You can include a charitable gift in your Will, big or small, it all matters.

THAT'S IT. SERIOUSLY. THAT'S ENOUGH TO START.

You can (and should!) update your Will anytime life changes, whether it's a new address, a new family member, or a change of heart. Remember: Writing your Will isn't a one-and-done thing, it's something that should evolve with you.

Now that you know what you actually need, let's take the next step together.
You're closer than you think.

BONUS TIP

Want to go further? You can also include funeral wishes, pet care, and digital account access, but all of that is optional

The Hardest (*and Most Important*) Part

HOW TO CHOOSE THE RIGHT PEOPLE FOR YOUR WILL

If we're being honest, writing a Will isn't actually hard. The paperwork may be cut and dry, but choosing the right people isn't always. It's normal to feel stuck or overwhelmed trying to name the right ones because this is often the hardest part for most people. This section isn't just a legal formality, it's emotional. It's about trust. It's about imagining a future you don't want to think about and deciding who you'd rely on in that moment.

It's also the part that makes this real.

WHO ACTUALLY WANTS TO HAVE TO THINK ABOUT:

- Who do I trust to manage everything after I'm gone?
- Who would I feel good about raising my kids?
- Who will love and care for my pets the way I do?

These are deeply personal questions. There's no perfect answer, but making a choice now means your loved ones won't have to guess later. Even if you don't have every detail figured out yet, start with what you know right now. You can always update your Will as life changes and remember, updates are quick and easy.

Start where you are. Pick the best fit for today. Revisit later if you need to.

WHO YOU'LL NEED TO NAME:



Executor



Guardian (if you have kids)



Pet Caregiver (if you have pets)

YOUR EXECUTOR

Your executor is the person responsible for carrying out your wishes and managing your estate after you pass away. They'll handle things like closing accounts, distributing assets, and working with any professionals (like lawyers or accountants, if needed).



TIPS FOR CHOOSING

- ✓ Choose someone responsible, organized, and financially trustworthy
- ✓ Ideally pick someone younger than you or name a backup executor
- ✓ Make sure they're willing to take on the role (have the conversation!)
- ✓ You can name a professional executor (like a trust company) if needed



RESOURCES

[How to choose an executor →](#)

[What your executor needs to know →](#)

YOUR GUARDIAN (IF YOU HAVE CHILDREN OR DEPENDANTS)

This is the person you trust to care for your children if something happens to you (and your partner, if applicable). It's a huge decision and a common place people get stuck.



TIPS FOR CHOOSING

- ✓ Think about shared values, not just location or lifestyle
- ✓ Consider age, health, stability, and existing relationship with your kids
- ✓ Have an open and honest conversation before naming them
- ✓ You should name backup guardians too



RESOURCES

[How to choose a guardian →](#)

[Writing a Will with children →](#)

[Expecting? What to know →](#)

Remember: *this isn't forever.*

You can (and should) update your Will as your kids grow and life changes.

YOUR PET CAREGIVER (IF YOU HAVE PETS)

If you're a pet parent, you can name someone to care for your furry (or feathered) loved ones. You can also leave a gift of money to help cover costs.



TIPS FOR CHOOSING

- ✓ Choose someone you trust who truly wants the responsibility
- ✓ Leave clear instructions and funds if possible (via a pet trust)
- ✓ Talk to them first, don't assume they'll say yes!
- ✓ If you don't have someone in mind, consider naming a local rescue or shelter as backup



RESOURCES

[How to create a pet trust →](#)

Let's get organized.

Before you sit down to write your Will, it helps to have your thoughts in one place. This worksheet is here to guide you through the key decisions you'll need to make, from who you want to name, to what you want to include.

Don't worry about having all the answers. Just fill out what you can for now. Even starting with the basics will help make the process smoother, faster, and less stressful.

Ready? Let's walk through it together.

TESTATOR – YOUR FULL LEGAL NAME

Full Name: _____

Address: _____

Gender: _____ Marital Status: _____

SPOUSE/PARTNER (IF APPLICABLE):

Full Name: _____

Relationship: _____ Gender: _____

CHILDREN (IF APPLICABLE):

Full Name: _____

Date of Birth: _____ Gender: _____

Full Name: _____

Date of Birth: _____ Gender: _____

Full Name: _____

Date of Birth: _____ Gender: _____

GRANDCHILDREN (IF APPLICABLE):

Full Name: _____

Date of Birth: _____ Gender: _____

Full Name: _____

Date of Birth: _____ Gender: _____

Full Name: _____

Date of Birth: _____ Gender: _____

EXECUTOR (PERSON WHO WILL CARRY OUT YOUR WISHES IN THE WILL):

Full Name: _____ Relationship: _____

Address: _____

ALTERNATE EXECUTOR (IN CASE YOUR FIRST CHOICE IS UNABLE TO SERVE)

Full Name: _____ Relationship: _____

Address: _____

SECOND ALTERNATE EXECUTOR (IN CASE YOUR FIRST CHOICE IS UNABLE TO SERVE)

Full Name: _____ Relationship: _____

Address: _____

GUARDIANS FOR MINOR CHILDREN (IF APPLICABLE):

Child's Name: _____

Guardian's Name: _____ Relationship: _____

Reason for Choosing Guardian: _____

*Guardian's Name: _____ Relationship: _____

Reason for Choosing Guardian: _____

* Alternate Guardian – if first choice is unable to serve:

Child's Name: _____

Guardian's Name: _____ Relationship: _____

Reason for Choosing Guardian: _____

*Guardian's Name: _____ Relationship: _____

Reason for Choosing Guardian: _____

* Alternate Guardian – if first choice is unable to serve:

SPECIFIC GIFTS

- Items, Property, or Money Left to Specific People or Organizations.
- Include details such as descriptions, names, and relationships.

Gift: _____

Gift: _____

Beneficiary: _____

Beneficiary: _____

Alternate Beneficiary: _____

Alternate Beneficiary: _____

Details: _____

Details: _____

CHARITABLE DONATIONS (OPTIONAL)

- If you wish to leave a donation to a charity, please provide:

Full Name of Charity: _____

Full Name of Charity: _____

Address: _____

Address: _____

Type of Donation

Type of Donation

- Money, Specific Item, Percentage of Estate

- Money, Specific Item, Percentage of Estate

ARRANGEMENTS FOR PETS (OPTIONAL)

- If you have pets, you may wish to include care instructions. Please provide:

Pet's Name: _____

Species/Breed: _____ Birth Date or Year: _____

Life Expectancy (if known): _____ Expected Annual Care Cost: _____

Primary Caregivers Name: _____

Alternate Caregivers Name: _____

**If first choice is unable to serve*

DISTRIBUTION OF REMAINING ESTATE

- *This is usually the main beneficiary of your estate*
- *After debts, expenses, and specific gifts have been distributed, who will receive the rest of your estate?*

Full Name: _____

Address: _____

Alternate Plan:

- *If your first choice cannot inherit, who should receive their portion?*

TRUSTS FOR CHILDREN

- *If leaving an inheritance to minors, at what ages should they receive it?*
- *Example: 1/3 at age 21, 1/3 at age 25, and the remainder at 30*

Name of Minor: _____

Age at which they should receive inheritance and amount:

Name of Minor: _____

Age at which they should receive inheritance and amount:

Name of Minor: _____

Age at which they should receive inheritance and amount:

FORGIVENESS OF DEBT

- *If you wish to forgive any debts owed to you, list them here*

Name of Debtor: _____

Amount & Details: _____

Frequently Asked Questions

NO SHAME, NO JARGON.

JUST CLEAR ANSWERS TO REAL QUESTIONS.

? Do I need a lawyer to write my Will?

No, in Canada a Will is legally valid as long as it's written by you and signed in front of two witnesses who are not beneficiaries. (That means they're not named in your Will or married to someone who is.)

? Do I need to get my Will notarized?

There is no legal requirement to have the document stamped by a lawyer or notarized. You can optionally have a witness sign an Affidavit in the presence of a Commissioner of Oaths and attach this to the Will.

? Who can witness my Will?

Anyone 18 or older who is not a beneficiary (or married to one). Friends, neighbours, or coworkers are often good options.

? What counts as an 'asset' in my Will?

It's not just homes or investments. Think: your car, savings, personal belongings, digital files, family heirlooms, even your pet. If you own it, you can include it.

? Can I include a donation to a charity in my Will?

Absolutely. You can leave a specific amount or a percentage of your estate to a cause that matters to you, it's actually one of the most meaningful ways to give back.

? Can I make changes after I create my Will?

Yes! That's one of the biggest perks of using a service like ours, your documents are fully editable anytime. As life changes, your Will can too.

STILL HAVE QUESTIONS? WE'VE GOT YOU COVERED.

Visit our full FAQ page at legalwills.ca/faq for more answers to common questions, or **contact our support team** anytime whether through live chat or email at support@legalwills.ca, we'll make sure you get the help you need.

A Sustainable Way to Support the Causes That Matter to You

Did you know you can support the causes you care about through your Will without impacting your finances today?

Charitable gifts in Wills, often called **legacy gifts** or **bequests**, are one of the most impactful ways to give. Whether it's a small percentage of your estate or a specific gift, these contributions help organizations plan for the future and allow you to leave a lasting mark on the people and causes that matter most to you.

And the best part? You don't need to be wealthy to give generously.

The fact of the matter is that legacy giving is for everyone, not just for those with large estates or financial advisors on speed dial. Even a modest gift in your Will can help fund programs, research, services, and advocacy for generations to come.

WHY INCLUDE A GIFT IN YOUR WILL?

- ✔ It's a powerful, accessible way to give back (without affecting your current income or lifestyle).
- ✔ It ensures the values you live by continue beyond your lifetime.
- ✔ It allows you to support organizations that reflect your beliefs, your story, your heart.

We've proudly helped thousands of Canadians leave legacy gifts through their Wills, including millions of dollars directed toward critical causes. In fact, nearly 1 in 4 Wills created on our platform includes a charitable bequest.

HOW TO LEAVE A GIFT TO CHARITY IN YOUR WILL

Adding a charitable gift to your Will is simple. As you step through the service, you'll be asked if you'd like to include a bequest to a charity.

YOU CAN CHOOSE:

- ✔ A specific dollar amount
- ✔ A percentage of your estate
- ✔ A specific gift (what's left after other gifts are distributed)

And just like the rest of your Will, your charitable gift can be updated at any time.
This is what Make a Will. Make a Difference. is all about.

And that's a wrap!

You've just worked through one of the most important documents of your life and we hope this toolkit helped make it feel a little less overwhelming, and a lot more doable.

What Now?

You're ready to take what you've gathered and turn it into a legal Will, just head to www.LegalWills.ca to get started.

You've done the prep. Now it's time to put it in writing because your story, your wishes, and your legacy deserve to be protected.

ALREADY FEELING PREPARED TO GET STARTED?

Use promo code **TOOLKIT10** to **SAVE 10%** on any of our services at LegalWills.ca



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