

4. Will Execution Checklist Kenneth Vercommen Law Office

Clients Name: _____

Attorney's Name: _____

Date: _____

Will Signing Instructions

1. Follow steps 1, 2, 3 and 4
2. Ask Questions a, b and c
3. Client puts date and signs twice
4. Witness one - signs name, puts address, prints name (this is done twice on will)
5. Witness two - signs name, puts address, prints name (this is done twice on will)
6. Attorney signs and dates. Under signature, write "An Attorney at Law of the State of New Jersey"
7. After signing, have staff make copy of Will. If not paid for, client must pay.

If Power of Attorney:

1. Attorney signs at top and print date
2. Client signs in First Area.
3. Client will need to sign either A) POA effective now or B) POA effective only upon disability [Most people make POA effective now (A)]
4. Attorney or Witness signs on Witness Line
5. Original POA and Living Will to client. Have client sign drafts of POA & Living Will if no changes to drafts. If no draft, make copy of signed POA & LW.
6. We DO NOT keep the original Will. Give client the original Will and keep a copy of signed Will in client's folder.

Procedure Initials*

1. _____: Will provisions explained and confirmed they conform to client's wishes.
2. _____: Execution procedure explained.
3. _____: Witnesses and Testator all present. No one to leave room until ceremony completed.
4. _____: Ask Testator following questions. Do not proceed if response is "no" to any question:

- | | Yes | No |
|--|------------|-----------|
| a. Do you declare this instrument to be your Last Will and Testament? | [] | [] |
| b. Does the Will express your wishes? | [] | [] |
| c. Do you request that witness 1 & witness 2 (recite names) here in your presence and in the presence of each other act as witnesses to your execution of this Will? | [] | [] |

5. _____: Make sure Testator has signed Will

6. _____: Witnesses sign Will and fill in addresses
 7. _____: Make copy of Will. Client keeps original Will. We only keep copy.
- a
- 8 Write on the client label on the folder (NOT FOLDER itself) " Original Will handed to client at signing & date."