

Special Requests

Your Will distributes your assets legally. But it doesn't cover everything.

Maybe you want your daughter to have your wedding ring. Maybe you want your son to get your guitar. Maybe you want your collection of vintage records to go to your best friend who actually appreciates them.

Maybe you want certain family recipes preserved. Maybe you want a specific poem read at your funeral. Maybe you want to make sure your grandchildren know the story of how their grandparents met.

This section is for those special requests.

WHY THIS MATTERS

These requests aren't legally binding (unless they're in your Will). But they carry weight because they're written in your own words.

Your executor and family will see what mattered to you. They'll know who you wanted to have what. And most families honor these wishes because it's clear they came from you.

This is your chance to make sure the things that matter to you end up with the people who will treasure them.

Let's write them down.

Your Special Requests

Who should receive the things that carry meaning, in your own words.

PERSONAL ITEMS & HEIRLOOMS

Not legally binding unless also in your Will, but most families honor written wishes.

ITEM 1 WHO SHOULD GET IT

ITEM 2 WHO SHOULD GET IT

ITEM 3 WHO SHOULD GET IT

ITEM 4 WHO SHOULD GET IT

ITEM 5 WHO SHOULD GET IT

COLLECTIONS

COLLECTION 1 WHO GETS IT / KEEP TOGETHER?

COLLECTION 2 WHO GETS IT / KEEP TOGETHER?

Your Special Requests (cont.)

JEWELRY

ITEM 1 WHO SHOULD GET IT

ITEM 2 WHO SHOULD GET IT

ITEM 3 WHO SHOULD GET IT

CHARITABLE DONATIONS

For legally binding donations, include them in your Will. Speak with your lawyer about the wording so the gift is set up properly.

CHARITY 1 AMOUNT OR %

CHARITY 2 AMOUNT OR %

CHARITY 3 AMOUNT OR %

DONATIONS IN LIEU OF FLOWERS? (WHICH CHARITY)

Your Special Requests (cont.)

FAMILY RECIPES & PHOTOGRAPHS

RECIPE / ALBUM

WHO GETS IT / WHERE KEPT

WHY THESE ITEMS MATTER

A NOTE ON WHY EACH GIFT GOES WHERE IT DOES (HELPS PREVENT DISPUTES)

Your Special Requests (cont.)

MEMORIAL & SPECIAL REQUESTS

MEMORIAL OR FUNERAL REQUESTS, SPECIAL TRADITIONS TO CONTINUE, DIGITAL LEGACY WISHES

Your Special Requests (cont.)

GUIDANCE FOR SPECIFIC PEOPLE

MESSAGES OR GUIDANCE FOR PARTICULAR FAMILY MEMBERS

Your Special Requests (cont.)

YOUR HOPES FOR YOUR FAMILY

WRITE HERE

Your Special Requests (cont.)

ANYTHING ELSE