



Will & Legacy Checklist

Use this checklist to prepare important documents and make your legacy clear for your loved ones.

✓	Write a clear and updated will.
✓	Keep identification documents ready (Aadhaar, PAN, Passport).
✓	Organize property papers, bank passbooks, and investment documents.
✓	Keep health insurance and life insurance policies accessible.
✓	Record details of nominees for all accounts and policies.
✓	Store documents safely and tell a trusted family member where they are kept.
✓	Review and update your will and documents regularly.

A proper checklist ensures peace of mind and reduces confusion for families in the future.