

Now That You Have a Will . . . (Things You Need to Know About Your Will)

Where shall I keep my Will?

You should keep your Will in a safe, but accessible, place. Some possibilities are:

- Safe deposit box.
- Filed with Probate Court in a sealed envelope.
- Safe place at home.
- Electronically stored with us.

Whom should I tell where my original Will is located?

You should tell your spouse and your Personal Representative (Executor) where your original Will is kept. In addition, your trusted heirs and family should be aware of where the Will is kept.

What do you do with the photocopy of my Will?

We keep it in our confidential file. We will not make copies for anyone other than you or someone you authorize.

Who should get copies of my Will?

It is not necessary for anyone other than you, the client, to have copies of your Will. If you wish, we will be glad to make copies for anyone you desire.

When should I review my Will?

We suggest that you review your Will every time there is a significant change in your family or financial situation. At minimum, you should review your Will every few years.

What are some changes that would cause me to review my Will?

- Death of a beneficiary.
- Marriage, divorce or remarriage.
- Birth or adoption of a child.
- Death or change of Personal Representative.
- Death or change of children's Guardian.
- If you change your mind about distribution.
- If you purchase a new home, start a business, a change in wealth, or other significant change.

This document contains general information and is not legal advice. You should speak to an attorney to discuss your particular circumstances.

- If you retire.
- If you buy, inherit, or receive assets as a gift.
- Finally, any time you feel uneasy about your Will, make changes so you do feel comfortable with it.

How do I change my Will?

Do not write on the Will. Changing your Will is often done by a Codicil, which is separate writing. However, if you are changing beneficiaries or changing the amounts being given to beneficiaries, it is a better practice to redo the Will. The fee for redoing your Will is usually the same as for adding a Codicil. We recommend that you contact us if you want to make any changes to make certain all changes are legally made. Simply writing on the will or crossing out language is not enough.

How do I revoke my Will?

Be aware that if you revoke your Will and die without one, your property will be distributed according to Minnesota Law, and that may not be the way you want it.

The best way to revoke an old Will is to revoke the old Will with a subsequent Will. Although, you may revoke a Will without creating a new Will, it is not preferred. You should speak with an attorney about what you are trying to achieve to make sure it is done properly.

Should I tell my personal representative who my attorney is?

Yes. If you should die, your Personal Representative should know where to locate your Will or a copy of it.

What if I have other questions about my will?

Feel free to call us. We are glad to answer your questions without charge.



Ledin, Hofstad, Troth & Fleming Ltd.

Phone: (320) 629-7537

Website: www.ledinandhofstad.com

Email: contact@ledinandhofstad.com

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