

WILLS INSTRUCTIONS

A. PERSONAL AND FAMILY PARTICULARS:

1. Full Name: _____
Address: _____

Occupation: _____
Telephone: Home: _____ Office: _____
Date of Birth: _____ Place of Birth: _____
Citizenship: _____
Marital Status (including plans to marry) _____
Have you or your spouse been married before? _____

2. Spouse's Full Name: _____
Address: _____

Occupation: _____
Telephone: Home: _____ Office: _____
Date of Birth: _____ Place of Birth: _____
Citizenship: _____

3. Children: (Please note with a * any child of a former marriage of either spouse:

Full Names

Date of Birth

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B. WILL PARTICULARS:

1. Full name, address, occupation and relationship, if any, to you of possible executor(s) and alternate executors.

2. Full name, address and relationship, if any, to you of guardian(s) for infant children. (alternate guardians?)

3. Do you have any specific articles you wish to gift to any particular person(s)? (provide full name and address or relationship to you of any such beneficiary)

4. Do you have any cash gifts you wish to make to any relative or charities or ____? (provide full name, address and relationship to you of any such beneficiary)

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5. (a) Do you wish to leave the residue of your estate to your spouse if he/she survives you? _____
- (b) If your spouse fails to survive you do you wish to leave your estate to your children? _____
- (c) If your children are minors:
- (i) at what age do you wish them to receive their share of your estate? _____
- (ii) if any child fails to survive to that age, do you wish his/her children, if any, to receive that share or your estate: _____
- (d) Other than to spouse or children? _____
- (e) If no spouse or child survives you, who do you wish to receive the residue of your estate? _____
- (f) If instructions are other than as contemplated by 5(a) to (e) above, outline your instructions below: _____

7. Do you wish to limit the investment discretion of your trustees?

