

Professionals and Self-Employed Decision Guide



Decisions to be made

1. Who will manage the estate (Executors/Trustee)? Typically for couples in the first instance this will be the surviving spouse?

For Client 1 _____

For Client 2 _____

2. Who will be the backup/s Executors/Trustees?

For Client 1 *First* _____

Second _____

For Client 2 *First* _____

Second _____

3. How is the estate to be distributed? i.e. equally or in specific proportions

For Client 1 _____

For Client 2 _____

4. How will the estate be distributed if none of the immediate family survive?

For Client 1 _____

For Client 2 _____

5. Who will manage the affairs whilst they are alive (Attorneys)? Typically for couples in the first instance this will be the spouse?

For Client 1 _____

For Client 2 _____

6. Who will be the backup/s Attorneys?

For Client 1 *First* _____

Second _____

For Client 2 *First* _____

Second _____

Specific notes-
