

Young and Growing Families

Decision Guide

CLIENT DETAILS

CLIENT 1: First Name Second Name Surname

Residential Address

CLIENT 2: First Name Second Name Surname

Residential Address

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: First Name Second Name Surname

FOR CLIENT 2: First Name Second Name Surname

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

FOR CLIENT 1: First Name Second Name Surname

First Name Second Name Surname

FOR CLIENT 2: First Name Second Name Surname

First Name Second Name Surname

3. Who will be guardians of the children if both parents die? If you appoint two guardians they must act jointly?

GUARDIAN NO 1: First Name Second Name Surname

GUARDIAN NO 2: First Name Second Name Surname

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

FOR CLIENT 1: Parents Siblings Other (please specify)

FOR CLIENT 2: Parents Siblings Other (please specify)

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: First Name	Second Name	Surname
FOR CLIENT 2: First Name	Second Name	Surname

6. Who will be the backup/s Attorneys?

FOR CLIENT 1: First Name	Second Name	Surname
Residential Address		
First Name	Second Name	Surname
Residential Address		
FOR CLIENT 2: First Name	Second Name	Surname
Residential Address		
First Name	Second Name	Surname
Residential Address		

Specific Instructions