

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

FOR CLIENT 1:

FOR CLIENT 2:

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

GUARDIAN NO 1: First Name Second Name Surname

GUARDIAN NO 2: First Name Second Name Surname

