

Estate PlanningDecision 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



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

FOR CLIENT 1: Parents Siblings Other (please specify)

FOR CLIENT 2: Other (please specify) Parents Siblings

6. 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:

7. 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