

Blended and Grown 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

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

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

FOR CLIENT 1:

FOR CLIENT 2:

3. 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)

4. 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

5. 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