

## **What Information is required when drafting a Will**

### **Passport copies/visa pages**

- Please bring copies of the above to your meeting with one of our consultants or scan and email them to us prior to the meeting. You will need to provide us with passport copies for yourself as well as your spouse and children (as applicable). We will also require the full name, passport number and country of everyone mentioned in the will, as detailed below.

### **Details of executors (minimum of 2) – full names and passport numbers**

- The executor to your will is the person who will act in your place when you have passed away. You may appoint family members or close friends or colleagues but they must be people that you know personally and can trust. The executor may also be a beneficiary under the will. We recommend that you appoint a minimum of two executors and at least one should be based locally. Please provide us with passport copies/details of the people that you choose.

### **Details of both interim guardians and/full time guardians – full names and passport numbers**

- If you have children who are minors (under 21 years of age) you will need to appoint guardians for them in your will. This appointment only becomes relevant when both parents pass away. We recommend that you appoint at least two interim & two permanent guardians. An “Interim guardian” means someone residing locally who can be immediately available to take care of your children until the permanent guardians are available. Interim and permanent guardians can be the same or different. Naturally, all guardians should be people that you trust and who your children are comfortable with. Passport copies/details are required.

### **Details of how you would like your estate to be distributed**

- You may distribute your estate as you like however married couples with children usually arrange for it to pass from one spouse to the other (level 1) and then to the children (level 2). In the case where the children are minors it is recommended that you have a third level in case the entire family passes away together; our clients often choose for their estate to be divided equally between both the husband and wife’s families or it can be given to a charity. However you decide to distribute your estate passport copies/details are required for all beneficiaries.

### **Details of any gifts**

- In the event that you want to make any gifts of money, jewellery or particular items, specific details are required. Alternatively, this can be done via a non-binding letter of wishes, which is separate to your will that you can update or change as and when you like.

### **Assets & liability list**

- It is not always necessary to list your assets in your will however we do recommend that you make a comprehensive list of your assets and liabilities in a separate document that can be continually updated as and when circumstances change.

### **Contact sheet**

- We recommend that you prepare a contact sheet with contact details of your executors and appointed guardians. You should leave a copy of this sheet with your close friends and colleagues so they know who to get in touch with in the event of your death.

### **Details of any business interests**

- If you own or have any shares in a company, it is important that we list these details in your will. We recommend that you have some sort of partnership agreement in place if there is more than one partner in the business and that you also have Key Man Insurance. Please scan and email details of the above as well as all trade licences, to us.

### **Funeral arrangements**

- We will require details of what your funeral wishes are i.e. whether you would like to be cremated or buried. We can also include any special requests you would like to make into your will or in a letter of wishes.