



# PREPARING YOUR WILL INFORMATION WE NEED

Please complete this questionnaire as fully as possible **before** you see us. Please write clearly using Block Capitals. We will go through it with you, discuss your wishes and then prepare your Will for you to sign.

## PART A – YOU AND YOUR FAMILY

### 1. YOUR DETAILS

Name (as appears in NRIC/Passport).....  
.....

NRIC/Passport No. ....

Nationality .....

Address .....

.....  
..... Postcode .....

Daytime Telephone Number .....

Mobile Number .....

Date of Birth .....

Occupation .....

Language Preference:  
English  Mandarin   
Dialect  (Please specify).....  
Signature.....

Are you (or any member of your family) known by any other names and do you own any assets in a different name? If so, please give full details below:

.....  
.....  
.....

### 2. YOUR HUSBAND/WIFE

Name (as appears in NRIC/Passport).....  
.....

NRIC No. ....

Date of Birth .....

Occupation .....

### 3. MARRIAGE DETAILS

- (a) Year of Marriage
- (b) Please tick this box if you are intending to marry/re-marry in the near future
- (c) Has either of you been married before  
Yes  No
- (d) Please tick this box if you are living with someone to whom you are not married.
- (e) Are you or your Spouse a Muslim?  
Yes  No

### 4. YOUR CHILDREN (INCLUDING YOUR CHILDREN FROM A PREVIOUS MARRIAGE OR RELATIONSHIP) – full names, dates of birth, and address if different from yours

(a) Name .....

NRIC No. ....

Date of Birth .....

Address .....

.....

(b) Name .....

NRIC No. ....

Date of Birth .....

Address .....

.....

(c) Name .....

NRIC No. ....

Date of Birth .....

Address .....

.....

\* If you are expecting a child or think you may have another child in future please tick this box.

**5. CHILDREN OF YOUR HUSBAND'S/ WIFE'S PREVIOUS MARRIAGES OR RELATIONSHIPS** – full names, dates of birth and address if different from yours

(a) Name .....  
 NRIC No. ....  
 Date of Birth .....  
 Address .....  
 .....

(b) Name .....  
 NRIC No. ....  
 Date of Birth .....  
 Address .....  
 .....

(c) Name .....  
 NRIC No. ....  
 Date of Birth .....  
 Address .....  
 .....

**Please note:**

- \* Adopted children (but not stepchildren or illegitimate children) generally have the same rights of inheritance as other children.
- \* A spouse or children excluded from benefit under your Will may have a right to claim a share of your property in certain circumstances. Please ask for advice, if appropriate

**PART B-YOUR HOME AND OTHER ASSETS**

**6. YOUR HOME** – is your home:

(a) Owned:

(i) in your name alone? Yes  No

(ii) in joint names with husband/wife/others?  
 Yes  No

Joint Tenants  Tenants-in-common

(iii) in the name of your husband/wife/others alone?  
 Yes  No

(b) Rented? Yes  No

(c) Others – e.g provided by a relative?  
 Yes  No

**7. If your answer was (c) please give more details:**

.....  
 .....  
 .....

**8. DO YOU HAVE A BUSINESS?**

Yes  No

If yes: - state type of business

.....  
 .....  
 .....

Is it a (tick box):

Company  Partnership  In Your Sole Name

**9. YOUR MAIN ASSETS**

(a) Other Property besides your home

Residential  Commercial

(b) CPF -

(i) Have you made a CPF Nomination?

Yes  No

(ii) CPF Investment Account?

Yes  No

\* **Please note** CPF Nomination does **not** include

Investment held in CPF Investment Account (except for fixed deposits with a bank).

(c) Insurance Policies

(i) Any Section 73CLPA policies?

Nominations of husband/wife/ children?

Yes  No

(ii) NTUC Income Policy

Yes  No

(iv) Other Nominations made

Irrevocable/ Revocable

Yes  No

If yes:-

Name of Company .....

Relationship with Nominee .....

(E.g. Mother, sister)

(iv) Mortgage Reducing Term Policy

Yes  No

Is it assigned to the Bank?

Yes  No

(d) Bank Deposits

(i) SRS Account

Yes  No

(ii) Overseas Accounts

Yes  No

(iii) Foreign Currency Deposits

Yes  No

(e) Other Stocks/Shares/Unit Trusts

Yes  No

Please list your **other** main assets below and give approximate values:-

.....

.....

.....

.....

**10. JOINT ASSETS**

Do you have any jointly owned assets? If yes, please give a general description, and their approximate values, and the name(s) of the other owner(s).

.....

.....

.....

.....

**Please note:** Jointly owned assets generally pass to the Joint owner automatically and cannot be given away by Will.

**11. DO YOU OWN ANY PROPERTY OR OTHER ASSETS ABROAD?**

If yes, please give details:-

.....

.....

.....

.....

(a) What are your main liabilities.

- Housing Loan –\*HDB/Bank
- Car Hire Purchase
- Other Hire Purchase
- \*Household items/Business
- \*Loans / Guarantees

\* *Delete as appropriate*

**PART C–FUNERAL, EXECUTORS, GUARDIANS**

**12. FUNERAL.**

(a) You may specify in your Will if you wish to be:-

- Buried  Cremated  No preference

(b) Are you An Organ Donor? Yes  No

**Please note:**

- \* You should make these wishes known to your immediate family as well and not rely on what is in your Will.
- \* If you wish to leave any part of your body for medical purposes tell your family and carry a donor card.

**13. EXECUTORS**

You must appoint executors to carry out the instructions in your Will. It is wise to have at least **two** and you may appoint your husband/wife as one. You should name other executors to act if he/she is unable to do so.

Our firm will be pleased to act as your executor, either alone or with a member of your family or friend. **Please get your proposed executors' consent before naming them.**

List below up to four chosen executors.

(a) Name .....

NRIC/Passport No. ....

Nationality.....

Address .....

.....

(b) Name .....

NRIC/Passport No. ....

Nationality.....

Address .....

.....

(c) Name .....

NRIC/Passport No. ....

Nationality.....

Address .....

.....

(d) Name .....

NRIC/Passport No. ....

Nationality.....

Address .....

.....

Would you like our firm to act as your executor?

- Yes  No

**14. GUARDIANS**

You may want to appoint one or two people to act as guardian(s) for children under 21. The appointment will usually only apply if you and the child's other parent are both dead. The position may be different if you are a single parent. Discuss this with the lawyer at your appointment. Guardianship involves a lot of responsibility and you should ask people to agree to act before appointing them.

(a) Name .....  
 NRIC No. ....  
 Date of Birth .....  
 Address .....  
 .....

(b) Name .....  
 NRIC No. ....  
 Date of Birth .....  
 Address .....  
 .....

**PART D - BENEFICIARIES**

The main part of your estate is called "the residue". (This is dealt with at question 17.) Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, and friends or to charities. These will be known as "beneficiaries".

**15. CASH GIFTS**

Please give the name and address of the beneficiary and the amount to be given, and give the age of anyone who is under 21.

(a) Name .....  
 NRIC No. ....  
 Address .....  
 ..... Amount .....  
 Below 21 years: Yes  No  Age:.....

(b) Name .....  
 NRIC No. ....  
 Address .....  
 ..... Amount .....  
 Below 21 years: Yes  No  Age:.....

(c) Name .....  
 NRIC No. ....  
 Address .....  
 ..... Amount .....  
 Below 21 years: Yes  No  Age:.....

(d) Name .....  
 NRIC No. ....  
 Address .....  
 ..... Amount .....  
 Below 21 years: Yes  No  Age:.....

**16. GIFTS OF ARTICLES**

Please give the names and addresses of people to whom you wish to leave specific items, and a full clear description of the article, to enable it to be identified. Please note that if you sell or replace one of these items, **the beneficiary will get nothing** – he or she will **not** be given the substituted item or the cash equivalent.

(a) Name .....  
 NRIC No. ....  
 Address .....  
 .....  
 Article.....

(b) Name .....  
 NRIC No. ....  
 Address .....  
 .....  
 Article.....

(c) Name .....  
 NRIC No. ....  
 Address .....  
 .....  
 Article.....

(d) Name .....  
 NRIC No. ....  
 Address .....  
 .....  
 Article.....

**17. THE RESIDUE**

This is all that you own except jointly owned property and the gifts made in questions 15 & 16. Please state below who is to receive the residue on your death and who is to receive it if they die before you. If there are gifts to your children, we may suggest a provision that if any of them dies before you, leaving children of his/her own, those children (your grandchildren) will inherit their parent's share.

The following are the more common provisions made. If you wish to use one of these, tick the appropriate box; if not, please go to question 19.

- (a) Everything to my husband/wife outright, but if he/she has died before me or dies within 30 days of my death then my children, named at question 4 equally;
- (b) Half to my husband/wife and half equally to my children;
- (c) Everything to my children, named at question 4 above, equally and any other children of mine;

You may choose the age at which your children will receive their entitlement. Insert choice from 21 or 25 years in this Box:

- (d) To my husband/wife named at question 2 above, but if he/she has died before me or dies within 30 days of my death to the person(s) / organization(s) named in the box below. If not in equal shares, then show the share each is to take.

.....

.....

.....

.....

**18. IF NONE OF THE ABOVE CHOICES IS APPROPRIATE**

(E.g. to parents, siblings etc)

Please set out below who is to receive the residue and, if more than one person or organization is involved, in what shares?

(a) Name .....

NRIC No. ....

Address.....

.....Share.....

(b) Name .....

NRIC No. ....

Address.....

.....Share.....

(c) Name .....

NRIC No. ....

Address.....

.....Share.....

Who is to benefit if the intended recipient dies before you?

(a) Name .....

NRIC No. ....

Address .....

..... Share .....

(b) Name .....

NRIC No. ....

Address .....

..... Share .....

(c) Name .....

NRIC No. ....

Address .....

..... Share .....

(d) Name .....

NRIC No. ....

Address .....

..... Share .....

**GENERAL NOTES**

1. A Will is usually **completely cancelled** if you marry after making it. You will need to make another Will immediately, or one which takes a forthcoming marriage into account.
2. On divorce, the Will stands. This can create problems and it is better to make a new Will.
3. If you are not making any provision for a husband/wife, or a former husband/wife or child, it is possible that he/she could make a claim against your estate. If this does apply please seek further advice from us.
4. Registration at the Wills Registry is optional. Please register on your own if you want to.
5. Any previous Will made? Yes  No   
If so, date of Will .....
6. A will comes into force only when the person passes away. Hence, it is important to make a Lasting Power of Attorney in the event of a mental incapacity (e.g. stroke, dementia, or in coma).
7. Please feel free to ask for our help or advice or more information on any topic related to your Will during your appointment. **We regret that we are unable to entertain enquiries over the telephone or via Email. We believe that we have a professional duty to know our client.**

To arrange an appointment to prepare your Will, please call Goodwins Law Corporation at **Tel No. 64649449** and ask for our **Private Client Services Department**.

We will need you to complete this form as comprehensively as possible and fax it to us at least one working day before the appointment, so that the lawyer seeing you can be adequately prepared. Our **Fax No. is 63234230**.

As far as possible we would like to work with your Financial Planner, Insurance Broker or Agent and take into account Financial & Tax Planning when preparing your Will.

Please provide the name of your:-  
Financial Planner / Insurance Agent

.....  
Name of Company

.....  
Agent Code (if known)

.....

### MAIN ASSETS INVENTORY

| ITEM  | ESTIMATED VALUE | LOCATION |
|-------|-----------------|----------|
| _____ | _____           | _____    |
| _____ | _____           | _____    |
| _____ | _____           | _____    |
| _____ | _____           | _____    |
| _____ | _____           | _____    |
| _____ | _____           | _____    |

### GOODWINS LAW CORPORATION

At Goodwins we focus on the things that matter to our clients, which are reflected in our culture of Client Care and Quality Control.

Goodwins has proven strength in its areas of practice and has been recognized as having leading lawyers in certain fields. The firm has an international outlook and we have practicing Solicitors from Australia and England leading key areas of practice.

We work closely with lawyers in other jurisdictions and with professionals such as Accountants, Tax Consultants and Financial Advisers, to make sure you get in-depth expert advice. Our clients enjoy more than just a law service.

Private Client Services and Estate & Financial Planning is led by Ang Kim Lan who is both a lawyer and a member of the Society for Trust and Estate Practitioners (STEP) with considerable experience working in and with the Financial Services Industry in Singapore and abroad.



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