



**WILL WRITING INFORMATION FORM**

Name : LEVINE LEE (A Franchisee of Rockwills)  
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Will Writing Fee: RM  
 Lifetime Custody (RM1,188) Yes or No  
 Oral Translation Required? Yes or No

**YOUR PERSONAL PARTICULARS**

Private & Confidential

Name			
NRIC No.		Date of Birth	
Address			

**A. DETAILS OF EXECUTORS / TRUSTEES (MAX 4)**

Rockwills Trustee Bhd as Executor (Optional)	Sole Executor		Substitute to the below	
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NAME (E1)			
NRIC No.		Relationship	
ADDRESS			

NAME (E2)		Substitute		Joint	
NRIC No.		Relationship			
ADDRESS					

NAME (E3)		Substitute		Joint	
NRIC No.		Relationship			
ADDRESS					

NAME (E4)		Substitute		Joint	
NRIC No.		Relationship			
ADDRESS					

B. GUARDIANS FOR MINOR BENEFICIARIES (WHEN BOTH HUSBAND AND WIFE PASSED ON)

NAME (G1)			
NRIC No.		Relationship	
ADDRESS			

NAME (G2)		Substitute		Joint	
NRIC No.		Relationship			
ADDRESS					

Payment to Guardian (A) Lump Sum RM\_\_\_\_\_ (B) Monthly RM\_\_\_\_\_ Total RM\_\_\_\_\_

C. DETAILS OF BENEFICIARIES

	Name	NRIC or Passport No.	Relationship	Remarks
B1				
B2				
B3				
B4				
B5				
B6				
B7				
B8				
B9				

D. LIST OF COMMON GIFTS – TO USE GENERAL CLAUSES (NO DETAILS REQUIRED)

<b>Joint Bank Accounts</b> to respective joint account holders	
<b>Joint Unit Trust Accounts</b> to respective joint account holders	
<b>Insurance policies</b> to those nominees who had already made nomination in the respective insurance policies	

	GIFTS	Beneficiaries (Shares (%))	Substitute Beneficiaries
1	All Bank Accounts – Savings/Current/FDs accounts		
2	Unit Trust / Mutual Funds Investment		
3	EPF moneys (if the nomination fails – for substitute beneficiary only)		
4	Insurance policies but excluding those nominated pursuant to Financial Services Act 2013		
5	All Motor vehicles/car/motorcycle		
6	Safe deposits boxes		
7	Jewelry		
8	Club Memberships		
9	Any future purchase of immovable property		
10	Shares listed on KLSE and overseas bourses		
11			

E. LIST OF COMMON GIFTS – TO USE SPECIFIC CLAUSES (NEED DETAILS)

(i) IMMOVABLE PROPERTIES – Need addresses or Title Details

	House/ Apartment / Condominium / Shop lot / Office Lot / Land	Sole Name	Joint Name	Beneficiaries (Shares (%))	Substitute Beneficiaries
1					
2					

3					
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(ii) Private Limited Companies/Partnership/Sole Proprietorship

	Name of company and registration no.	Beneficiaries (Shares (%))	Substitute Beneficiaries
1			
2			
3			

(iii) Specific Item

	Name of company and registration no.	Beneficiaries (Shares (%))	Substitute Beneficiaries
1			
2			
3			

F. RESIDUARY ESTATES

	Beneficiaries	Share (%)
Main Beneficiaries		
First Substitute Beneficiaries		
Second Substitute Beneficiaries		
Third Substitute Beneficiaries		

G. CREATE A TESTAMENTARY TRUST

OPTIONAL

**For Movable Assets**

	Beneficiaries	Share (%)
Who are the beneficiaries?	Eg. Children, Parents	
What are the purposes?	Eg. For the children MEM or grandchildren education	

Maintenance, Education, Medical, Expenses, Other		
What assets to set aside for the trust?	Eg. All movable assets or bank accounts, etc.	
What is the duration of the trust?	Eg. Until particular child attains 21 years old or youngest child attains 21 years old upon demise of the parents	
Payment to beneficiaries?	Eg. Discretion of Trustee? Or Amount payable RMxxxx per month?	
Who gets the balance of the trust when the trust period ends?	Eg. Children	
Trustees if different from Executors		

**For Immovable Properties**

Beneficiaries who have the right of occupations?	Eg. Children or Parents	
Beneficiaries who can enjoy rental income ?	Eg. Children or Parents	
What assets to set aside for the trust?	Eg. All immovable assets or particular property	
What is the duration of the trust?	Eg. Until particular child attains 21 years old or youngest child attains 21 years old upon demise of the parents	
Powers of Trustees?	Eg. Power to sell, power to lease	
Beneficiaries at the end of the trust period?	Eg. Children or Parents	
Trustees if different from Executors		

**H. CONDITIONS / OTHER MATTERS**

OPTIONAL

(1) House not for sale or mortgage before 35 years (2) Private Principal Residence (PPR);
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**I. POWERS OF EXECUTOR AND TRUSTEE**

OPTIONAL

(Giving the Executor and Trustee additional powers not given by the Trustee Act 1949)

Please cross (x) applicable

@	Power to insure against fire and other losses
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@	Power to appoint professional person or trust corporation
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@	Power to borrow money using assets in the estate as collateral
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@	Power to invest freely including unsecured investments
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@	Other powers
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J. OTHER MATTERS

OPTIONAL

Please cross (Y) applicable

X	Commorientes : number of days to survive	30	days
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(Beneficiary in the Will is only entitled to his/her share if he/she survives the testator by the number of days stated above)

Reason(s) for excluding beneficiary under Inheritance (Family Provision) Act 1971			
Name (as in NRIC/Passport)		Relationship	
Reason(s)			

Define Children in the Will	
	Include any other child born to me
	En ventre sa mare (unborn child) (for Male Testator only)
Of a particular spouse/ person: Name	

K. OTHER SPECIFIC ITEMS – MY WISHES

OPTIONAL

For example: I wish my body to be buried and my funeral in accordance with the rites of Christian
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Terms of Endearment:
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