PREPARING FOR YOUR ESTATE PLANNING APPOINTMENT

RDM LAWYERS LLP

YOUR LAWYERS FOR LIFE

1. **COMPLETED PERSONAL INFORMATION CHECKLIST**

Please complete and return to us (preferably in advance of your appointment, if possible) the completed personal information checklist that was sent to you when you booked your appointment. This information will be the basis for your discussions with your lawyer about your Will and other estate and incapacity planning documents.

2. **COPIES OF RELEVANT DOCUMENTS / AGREEMENTS**

Where applicable, we recommend providing copies of the following documents for our review:

- Marriage agreement (prenup or cohabitation agreement)
- Separation Agreement or Divorce Order from a prior relationship
- Current Will, Enduring Power of Attorney, or Representation Agreement
- Shareholders Agreement, Partnership Agreement, or any other business agreement restricting the transfer of your business interest

3. **WHO DO YOU WANT TO BE YOUR EXECUTOR / TRUSTEE** (person who carries out the instructions in your Will and administrates any trusts established in your Will. If the first appointed Executor is unable or unwilling to act then you can appoint an alternate. A co-executor appointment could also be considered):

Full legal names and addresses, and their relationship(s) to yourself

4. **WHO DO YOU WANT TO BENEFIT FROM YOUR ESTATE** (eg: spouse, children, stepchildren, relatives, friends, charitable organizations, educational or other institutes):

For individuals, full legal names and addresses, and their relationship(s) to yourself

5. **WHO DO YOU WANT TO APPOINT AS GUARDIANS OF YOUR MINOR (UNDER 19) CHILDREN?** Alternate guardians?

Full legal names and addresses, and their relationship(s) to yourself

6. **OTHER THINGS TO CONSIDER:**

Do you require an Enduring Power of Attorney (appoints somebody to make legal and financial decisions on your behalf)?

Do you require a Representation Agreement (appoints somebody to make personal and health care decisions on your behalf)?