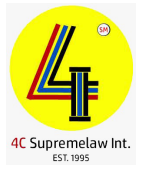




My Will



Will/Trust Questionnaire:

The information requested below is essential in preparing your will or trust. If both you and your spouse require estate planning documents, you will need to each fill out a separate questionnaire.

1.	Personal	Personal	Full Name:- Address:- PAN:- Date of Birth:-
2.		Marriage (if any)	Full name of spouse:- Date of marriage:-
3.		Children (if any)	Full name:- Date of birth of each child:-
4.		Fitness	Just a confirmation about mental & physical fitness:-
5.		Executor (if any)	Full name:- Address:- Nationality:- Relationship:- Also Alternate Executor, if any:-
6.		Guardian for minor kids (if any)	Full name:- Address:- Nationality:- Relationship:- Also Alternate Guardian, if any:-

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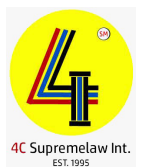
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Will/Trust



7.	Properties (which is owned by Self/ Jointly)	Business- Proprietorship (if any)	Firm name and address
8.		Business – Partnership Firm (if any)	Name of firm:- Address:- “%” of share in firm:-
9.		Business – Company (if any)	Name of company:- “%” of holding:-
10.		Immovable Properties (Type) (Tick the option)	Land, Office, Bunglow, Office, Warehouse, Flat
11.		Immovable Property Details	Details about full address:- Size of property:-
12		Insurance Policies	Name of Insurance Company:- Policy Numbers:- Sum Assured:-
13		Vehicles	Registration Number:- Color:-

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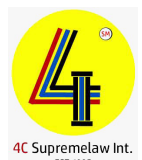
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Will/Trust



14		Jewelry	Either weight-wise (Gold, Silver) OR Each Item-wise :-
15	Details of NGO/Trust owned by you or you are Member of any.		
16		Provident Fund (For employment clients)	Name of company where employed and address of company:-
17		Gratuity (for employment clients)	Name of company where employed and address of company:-
18	Details of Membership of Club/institution		
19	Bank Accounts	Name of Bank, Branch and Account Number:-	
20	Safe Deposit Lockers	Name of Bank, Branch and Locker Number:-	
21	Fixed Deposits	FD No, Bank / Company, Branch, Amount:-	
22	Demat Account	Name of DP:, Demat Account Number:-	

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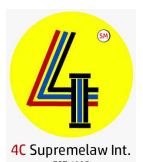
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Will/Trust



23	Physical Shares	Name of Company and Number of shares	
24	Wealth Management Account	Name of institution and Account number	
25	Mutual Fund	Name of institution and folio number	
26	Public Provident Fund (PPF)	Name of Bank/ Post Office:- Account Number:-	
27	Postal Saving Account	Name of Post Office:- Account Number:-	
28	Bond / Debentures	Name of Institution:- Folio Number:-	
29	Digital Assets	Details of each of Digital Assets	

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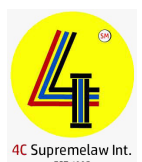
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Will/Trust



30	Details of Joint Properties (for all assets)	Details of Joint owner where property is owned jointly	
31	Liabilities (If Any)	Home Loan, Vehicle Loan, Personal Loan	Details of institution, Loan amount, Account Number:-
32	Details of Credit Card		
33	Donations (If Any)	Charity, Organ Donation	Details of donation wishes
34	Living will		
35	Distribution of Assets	Asset-wise OR Percent-wise	Name and Relationship of beneficiary, alternate beneficiary
36	Witnesses	Two Witnesses	Name, address, relationship

Note : Please attach a Seperate Sheets for Multiple Properties/Bank account etc.

*Kindly fill the above form



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Will/Trust

