



WILL & SUCCESSION PLANNING GUIDE

A CHECKLIST TO PROTECT YOUR LEGACY
AND SECURE YOUR LOVED ONES.



1. DO YOU HAVE A WILL?

Ensure you have a valid, up-to-date Will that clearly states how your assets should be distributed.

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2. HAVE YOU NAMED YOUR BENEFICIARIES?

Clearly identify your heirs and ensure their details are accurate and up to date.

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3. HAVE YOU APPOINTED AN EXECUTOR?

Appoint a trusted person to execute your Will and manage your estate.

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4. HAVE YOU LISTED YOUR ASSETS?

Make a complete list of your assets including property, bank accounts, investments, insurance, and valuables.

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5. HAVE YOU CONSIDERED NOMINATIONS?

Ensure nominations are updated for bank accounts, investments, insurance policies, and other assets.

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6. HAVE YOU PLANNED FOR TAXES & LIABILITIES?

Plan for potential taxes, debts, and liabilities to protect your estate and beneficiaries.

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7. HAVE YOU PLANNED FOR MINORS OR DEPENDENTS?

Nominate a guardian for minor children and make provisions for their future.

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8. IS YOUR WILL SAFE AND ACCESSIBLE?

Store your Will in a safe place and inform your executor or a trusted family member about its location.

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REMEMBER:

A Will is not just about assets, it's about your loved ones, your values and the peace of mind that comes with being prepared.

Plan today. Protect tomorrow.



Plan Your Legacy. Protect Your Family.

We help you create a Will and Succession Plan that gives you peace of mind.



Need Expert Guidance?

Book a consultation today and secure your legacy.



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