COUPLES TESTAMENTARY TRUST BUNDLE CHECKLIST



	NOTES
Will maker and Spouse details	
Name and Address	
Other name of Will maker and spouse (if any)	
 Do you/your spouse have any assets in 	
another name?	
Age of Majority	
 Age the children or grandchildren get their 	
interest in your Estate?	
Backup Executor details (after you and your spouse	
are dead)	
Name and Address	
Guardian details (if any of YOUR children under 18	
years of age)	
Name and address	
Specific gifts (Any specific gifts? e.g. car or cash	
 Gift description and name of the person. 	
Residuary Beneficiaries	
Name and Address	
Age and Percentage	
The Disaster Clause (if all Residuary Beneficiaries	
and their children are dead?)	
Name and Address	
Age and Percentage	
Challengers for Will maker and spouse	
Is it possible that someone may challenge	
your/your spouse's Will?	
Contemplation of Marriage	
 Name of someone whom you/your spouse 	
may marry	
Contemplation of Divorce	
Name of someone whom you/your spouse	
may divorce	

	nation for Substitute Person receiving the ng Power of Attorney of the Will maker:		BARRISTERS & SOLICITO
	Is there more than one person?		
	The full name of the person(s)		
	The address of the person(s)		
	If more than one person is chosen, do they act together or separate?		
Enduri	nation for Substitute Person receiving the ng Power of Attorney of the Will makers		
spouse	2:		
	Is there more than one person?		
	The full name of the person(s)		
	The address of the person(s)		
	If more than one person is chosen, do they act		
	together or separate?		
	nation for Substitute Person receiving the all Power of Attorney of the Will maker:		
	Is there more than one person?		
	The full name of the person(s)		
	The address of the person(s)	-	_
	nation for Substitute Person receiving the all Power of Attorney of the Will maker:		
	Is there more than one person?		
	The full name of the person(s)		
	The address of the person(s)		

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