



# WILL INFORMATION FORM

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## 1. Personal Information

Full Name	
ID Number	
Email	
Cell	
Spouse Name	
Spouse ID/DOB	

## Dependents

Name	ID/DOB	Relationship

## 2. Will Status

Do you have a Will? Yes ☐ No ☐

Last updated: \_\_\_\_\_

## 3. Distribution of your Estate

Beneficiary Name	Relationship	Percentage / Allocation

## 4. Assets & Liabilities

Movable Property (Bank accounts, investments, vehicles, etc.): \_\_\_\_\_

Immovable Property (Homes, farms, etc.): \_\_\_\_\_

Retirement Funds / Policies: \_\_\_\_\_

Liabilities (Home loans, personal loans, suretyships, etc.): \_\_\_\_\_

## 5. Specific Bequests

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## 6. Last Wishes

Burial Type Preferred: Buried ☐ Cremated ☐ Organ Donor ☐ Living Will ☐

Details (Place of burial/cremation, religious/cultural rites, etc.): \_\_\_\_\_

## 7. Executor Appointment

Do you wish GIB Financial Services to be the executor of your estate? Yes ☐ No ☐

Executor Fee: Standard Tariff (3.5% + 6%) ☐ Agreed Fee under GIB Legacy Protection Plan ☐

Executor/Co-executor Name	Relationship

## 8. Testamentary Trust

Do you wish to create a Testamentary Trust? Yes ☐ No ☐

Termination: Beneficiary Age \_\_\_\_ OR Date \_\_\_\_\_

Co-trustee Name	Relationship

## 9. Guardianship for Minors

Guardian Name	Relationship

Alternate Guardian(s): \_\_\_\_\_

## 10. Business & Digital Assets

Business Interests (Companies, partnerships, shares): \_\_\_\_\_

Digital Assets (Social media, online accounts, crypto, etc.): \_\_\_\_\_

## 11. Special Circumstances

Foreign assets requiring separate will? Yes ☐ No ☐

Previous marriages / divorce orders / maintenance obligations: \_\_\_\_\_

Dependants with special needs: \_\_\_\_\_

## 12. Witnesses

Witness Name	ID Number	Signature