

DETAILS FOR WILL DRAFTING



PERSONAL DETAILS

1. Personal Details

Sr. No.	Titles	Details
1	Title:- Mr/ Miss/ Mrs/Master	
2	Full Name	
3	Father's Full Name	
4	Permanent Address	
5	Currently residing at Address	
6	Gender	
7	Date of Birth	
8	Religion	
9	Nationality	
10	Passport No (in-case of NRI)	
11	Identity Proof with Number	
12	Identity Proof with Number	
13	Email address	

2. Marital Status*

Sr. No.	Options	Yes	
1	Single		
2	Married		
3	Divorced		
4	Divorced & Remarried		
5	Widow		

3. Spouse Details

Sr. No.	Titles	Details
1	Full Name	
2	Date of Birth	
3	Religion	
4	Nationality	
5	Identity Proof	

4. Details of Child/Children

No. of Children	Name	Date of Birth	Identity Proof with	Passport No. (In-case of NRI)
1				
2				
3				

**5. Details of Guardian (in-case of minor) (To be filled only if you have minor children)
(Please provide 2 guardian details)**

Sr. No.	Titles	Details
1	Full Name	
2	Address	
3	Religion	
4	Nationality	
5	Relation with you	
6	Identity Proof-PAN/Aadhar/Passport No.	

6. Are you a co-parcener of a Hindu Undivided Family (HUF)?

Yes	No

7. Are you a Karta of Hindu Undivided Family (HUF)? Yes/No

Yes	No

ASSETS

**8. How would you like to distribute your assets?
(Choose one only)**

Sr. No.	Options	Yes	No
1	All assets to spouse, if your spouse predeceases you, then to children		
2	All assets to your spouse only		
3	All assets between your spouse and your child / children		
4	Equally between children or in different proportions		
5	Different assets to different beneficiaries in varying proportions?		
6	<p>Other:</p> <p>i. Would you like to Will the right of residence to your spouse and the ownership of the house and all other assets to your child/children equally.</p> <p>ii. Would you like to Will income from assets to stated individuals and assets to another</p> <p>iii. Would you like to Will some or all of your assets to charity.</p> <p>iv. Would you like to Will some or all your assets to an existing trust or to a trust stated in the Will.</p> <p>v. Some of the beneficiaries are Non-residents.</p> <p>vi. Would you like to provide for a person with special needs.</p> <p>Kindly get in touch with us.</p>		

9. Details of immovable assets

Please Note

1. Physical assets need to be specifically distributed
2. If you are dividing the property then specify the part of property to each beneficiary

Sr. No.	Type of Property: *House / commercial / land & Full Address	Holding: Singly / Jointly (Please mention the name of joint holder)	Status of property Leased / Freehold / Other	Inherited /Self- Acquired	Beneficiary
1					
2					
3					

9a. Society Flats/Property

Sr. No.	Type of Property: *House / commercial / land/Farm House & Full Address	Holding: Singly / Jointly (Please mention the name of joint holder)	Status of property Leased / Freehold / Other	Inherited /Self- Acquired	Beneficiary
1					
2					
3					

10. Bank details

Sr. No.	Bank Name and Address	Account No.	Type of Account	Mode of Holding: Single/Joint (please mention the name of joint holder)	Name of the Nominee	Beneficiary
1						
2						
3						
4						
5						

11. Fixed deposits

Sr. No.	Bank Name and Address	Deposit No.	Mode of Holding: Single/Joint (please mention the name of)	Name of the Nominee	Beneficiary
1					
2					
3					
4					
5					

12. Mutual funds

Sr. No.	Fund Provider Name	Folio No.	Holding	Beneficiary
1				
2				

13. Shares

Sr. No.	DP Name	Demat Account No.	Name of the Nominee		Beneficiary
1					
2					

*In-case the shares are in physical form, please provide the details

14. Bonds

Sr. No.	Name of the Bond	Bond ID No.	Holding		Beneficiary
1					
2					

15. Insurance policy

Sr. No.	Name of the Policy Issuer	Policy No.	Holding	Nominee	Beneficiary
1					
2					
3					

*please make sure that the beneficiary you appoint for the insurance policy is the same appointed as nominee on your insurance policy

16. Profident fund

Sr. No.	Issuer Name	Identification No.	Name of Nominee	Beneficiary
1				
2				
3				

17. Public Provident Fund

Sr. No.	Issuer Name / name of the bank and address	Account No.	Name of the Nominee	Beneficiary
1				
2				
3				

*The proceeds of Public Provident Fund are handed over only to the nominee appointed therein. Thus we advise to appoint the same person as nominee in the Will as appointed for the account to avoid the dispute.

18. Jewellery Details

Sr. No.	Details	Inherited/acquired	
1			
2			
3			

19. Artefacts/Furniture

Sr. No.	Details	Legatee
1		
2		
3		

20. Automobiles

Sr. No.	CAR No.	Model	Make	Legatee
1				

2				
3				

21. Firearms/Ammunation

Sr. No.	Model	Make		Legatee
1				
2				
3				

22. DIGITAL ASSETS (Include your Cell Phone Number, Email ID's, Social Media Accounts, Softwares, Music Collections etc)

Sr. No.	TYPE OF ASSET	DETAILS	Legatee
1			
2			
3			

23. Other Assets

Sr. No.	Details	Legatee
1		
2		

LIABILITIES

Sr. No.	Name of the lender and address	Type of liability	Loan account Number		Other details

1					
2					
3					

DETAILS OF EXECUTOR

24. Details of the Executor

(Executor is a person who is responsible to manage the distribution of the assets after the testator's lifetime.)

(Please provide 2 executor details)

Sr. No.	Full Name	Permanent Address	Gender	Nationality	Pan Card No.
1					
2					

BENEFICIARIES / LEGATEES

25. Beneficiaries / Legatees

Sr. No.	Titles	Details
1	Whom would you want the shares in your business to go to?	
2	Name of legatees and proportion of distribution of all assets if different assets are to be bequeathed to different legatees	
3	In-case any of your beneficiary happen to die before the execution of this Will, who would you want to give his/her share?	
4	If all the beneficiaries happen to die together, who would you want to be beneficiary?	

5	Who would you like to give you future assets?	
6	Only if more than 1 Executor In the event of dispute between the co-executors, whose decision you wold want to uphold?	

26. Some Questions for You

1	Do you want to disinherit a particular person? If yes Please provide the name and relationship	
2	Do you want to disinherit a beneficiary if he/she contests this will	
3	Do you want to add the survivorship clause so that it if a particular beneficiary passes away within a particular time frame after your passing away the assets are directly given to the legal heirs of that particular heirs or to the next beneficiary mentioned in this will?	
4	Would you like to give 'life interest' i.e. usage rights but not selling or willing rights to a particular beneficiary or for a particular asset?	
5	Is any of you beneficiary in this 'Will' is a foreign national? Are you aware of Estate Tax/Inheritance Tax implications? Also are you aware of FERA Provisions for such beneficiaries?	