

CHRISA FINANCIAL PLANNING SDN BHD

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WILL CHECKLIST 写遗嘱检查表

1. PERSONAL DETAILS (ENSURE IT IS ACCURATE AND COMPLETE)

个人资料(请保证资料是准确和完整的)

- **Testator / Executor(s) & Trustee(s) / Guardian(s) / Beneficiary(s)**
立遗嘱者/执行人和信托人/监护人/受益人
 - Name (As Per NRIC) 姓名(跟身份证)
 - IC No or Passport No./ Birth Certificate No. (身份证或护照号码/出身纸号码)
 - Correspondence Address 通信地址
 - Contact Number 联络号码
- Section B: Appointment of Executor(s) – At least 2 if any Beneficiary is minor (below 18 yrs old)
委任遗嘱执行人 - 如有未成年(十八岁以下)的受益人至少两位(共同)
- Section C: Appointment of Guardian(s) – For any children below 21 years old.
委任监护人 - 如有二十一岁以下的孩子

2. SECTION E: EXAMPLE OF ITEMS TO WILL AWAY 列下要给的项目

<input type="checkbox"/>	Cash Gift 现款
<input type="checkbox"/>	Bank Accounts 银行账户
<input type="checkbox"/>	Unit Trust / Mutual Fund 单位信托基金 / 互惠基金
<input type="checkbox"/>	House / Apartment / Condominium / Flat 房屋 / 公寓 / 楼房
<input type="checkbox"/>	Shophouse / Shoplot 店屋
<input type="checkbox"/>	Factory 工厂
<input type="checkbox"/>	Land 地
<input type="checkbox"/>	Car / Motorcycle / Bicycle 车 / 摩托车 / 脚踏车
<input type="checkbox"/>	Jewellery 手饰
<input type="checkbox"/>	Gifts of a specific item 特别礼物
<input type="checkbox"/>	Shares listed in KLSE 吉隆坡股市的股票
<input type="checkbox"/>	Shares Listed in Overseas Boards 在外国的股票
<input type="checkbox"/>	Private Limited Company Shares 私人有限公司的股份
<input type="checkbox"/>	Business (Sole proprietorship) 生意(单独业主)

For example:

- HOUSE HELD UNDER NO.2 JALAN TIGA, TMN MELAKA 60000 KUALA LUMPUR
- MONIES IN ALL BANK ACCOUNTS IN LOCAL AND OVERSEAS
- ALL UNIT TRUST AND INVESTMENTS IN LOCAL AND OVERSEAS
- ALL LISTED SHARES AND STOCKS IN KLSE, OVERSEAS STOCK EXCHANGE
- SHARES IN ABC SDN BHD (CO. NO.123456-U)
- CAR WITH THE REGISTRATION NO. A 2
- ALL OTHER MOTOR VEHICLES

3. THINK & FINALISE THE FOLLOWING 考虑和总结以下:

- List Down Liabilities/Debts and Decide How To Pay Them 列下债务和如何偿还
- List Down Assets and Decide How To Distribute Them 列下资产和如何分配
- Safe Custody Of Wills – Where Do You Intend To Keep Them 遗嘱保管 – 您要把遗嘱收藏在那?