

LETTER OF WISHES FOR A WILL

Testator's Full Name: _____

Introduction:

This Letter of Wishes is intended to provide guidance to the Executors and Trustees of my Will regarding the distribution of my estate and the care of my beneficiaries. It is not legally binding but should be considered alongside my Will.

General Guidance to Executors and Trustees:

I request that my Executors and Trustees act with fairness, discretion, and prudence in administering my estate in accordance with my wishes as expressed in my Will and this Letter.

Specific Wishes Regarding Beneficiaries:

1. I wish that my Executors and Trustees consider the following when distributing my estate:

- To provide for the maintenance and education of any minor children in a manner consistent with their current lifestyle and future needs.
- To consider the personal circumstances of each beneficiary, including health, financial situation, and relationship with other beneficiaries.
- To exercise discretion in the timing and manner of distributions to beneficiaries who may require assistance managing their inheritance.
- To take into account any previous gifts I have made to beneficiaries during my lifetime.
- To act in a manner that promotes harmony among beneficiaries and minimises conflicts.

Trusts and Guardianship:

If any trusts are established under my Will, I wish my Trustees to administer these trusts in the best interest of the beneficiaries, with regard to their health, education, maintenance, and advancement in life. For any minor beneficiaries, I wish that the appointed Guardians act in their best interests, providing care, protection, and guidance consistent with my values.

Charitable Donations:

I encourage my Executors and Trustees to consider making charitable donations from the residual of my estate to causes or organisations that I have supported during my lifetime, where appropriate.

Funeral Wishes:

I wish for my funeral and memorial services to be conducted in a manner that respects my beliefs and values, with consideration to simplicity and the wishes of my family.

Additional Notes:

This Letter is to be read alongside my Will and any other testamentary documents. I understand that this Letter is not legally binding and may be amended or revoked at any time by me during my lifetime.

Signatures:

TESTATOR'S SIGNATURE

WITNESS'S SIGNATURE

Signature: _____

Signature: _____

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