

## Instruction for Preparation of Last Will and Testament

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**Client Details:**

**Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_ **Email:** \_\_\_\_\_

1. Name of Testator/Testatrix: \_\_\_\_\_

2. Address of Testator/Testatrix: \_\_\_\_\_

3. Name of Person (s) been appointed Executor (s)/Executrix (ces)  
\_\_\_\_\_

4. Name of Trustee (if any)  
\_\_\_\_\_

5. Names and Addresses of two (2) witnesses:

Witnesses to be provided by Barrow & Williams

Witnesses to be provided by client

1st Witness

2nd Witness

Name: \_\_\_\_\_ Name: \_\_\_\_\_

Address: \_\_\_\_\_ Address: \_\_\_\_\_

Occupation: \_\_\_\_\_ Occupation: \_\_\_\_\_

Note: A beneficiary and/or spouse cannot be a witness a Will.

6. List all personal property/chattels to be included in will. Indicate name of beneficiary (ies) and how to distribute funds/shares/chattels.

Bank Accounts

Credit Union Accounts

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Shares in companies:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

