



# Fact Finder Form

Case No.

Please complete this form in **BLOCK LETTERS**

## **SECTION 1 – Client's particulars**    **\*\* Delete whichever not applicable**

Name (as in NRIC)		NRIC No.	
Address	SINGAPORE		
Religion	<b>Non Muslim Only</b>	Date of Birth	

## **SECTION 2 – Appointing Executor and Trustee**

Details of <b>Main</b> Executor and Trustee			
Gender	Relationship	Full name as per NRIC	NRIC No.
M / F			

Details of <b>substitute</b> Executor and Trustee			
Gender	Relationship	Full name as per NRIC	NRIC No.
M / F			

Details of <b>second substitute</b> Executor and Trustee			
Gender	Relationship	Full name as per NRIC	NRIC No.
M / F			

## **SECTION 3 – Appointing substitute Guardian (only needed if you have children below 21 years of age)**

**The surviving biological parent will be the Main Guardian.**

Details of <b>substitute</b> guardian		
Relationship	Full name as per NRIC	NRIC No.

Details of <b>second substitute</b> guardian		
Relationship	Full name as per NRIC	NRIC No.

## **SECTION 4 – Specific gifts**

Description of asset	Distribution Rule
Real Property – Single	Will be distributed by Will
Real Property – Joint tenancy	Will be given to surviving joint tenant
Real Property – Tenancy-in-common (%)	Your share will be distributed by Will
Insurance Policies with nomination	Will be given to nominated beneficiary
Insurance Policies without nomination	Will be distributed by Will
Joint bank accounts	Will be given to surviving account holder
Jewellery and contents in safe deposit box	Will be given to the beneficiary labelled

**SECTION 5 – Distribution of all personal properties by percentage:**

(including bank accounts, cash, club membership, shares, insurance policies without nomination, motor vehicle etc)

**\* CPF moneys not included, you need to make a separate CPF nomination.**

Relationship	Name of beneficiary	NRIC No.	Share	Substitute beneficiary	
			%	Survivor	
			%	Survivor	
			%	Survivor	
			%	Survivor	
			%	Survivor	
			%	Survivor	
			%	Survivor	
			%	Survivor	
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			%	Survivor	
			%	Survivor	
			%	Survivor	
			%	Survivor	
			%	Survivor	

**Additional information about this Will:**