Your Legacy Planning Starter Checklist

Mezzanine Legacy

NAME: ______________ NRIC: ______________ ADDRESS: ______________

STEP 1 List your assets and key documents

What do you currently own or manage?

PROPERTY

- [ ] HDB
- [ ] Private
- [ ] Overseas

LIQUID ASSETS

- [ ] Bank Accounts
- [ ] Fixed Deposits

INVESTMENTS

- [ ] Stocks
- [ ] Bonds
- [ ] Crypto

CPF ACCOUNTS / NOMINATION DONE?

- [ ] Yes
- [ ] No

INSURANCE POLICIES

- [ ] Life (Term)
- [ ] Life (Whole)
- [ ] Health
- [ ] Critical Illness
- [ ] Personal Accident

DIGITAL ASSETS

- [ ] eWallets
- [ ] Domains
- [ ] Crypto Keys

OTHER DOCUMENTS

- [ ] Wills
- [ ] Trust Documents
- [ ] Lasting Power of Attorney (LPA)

BUSINESS INTEREST / SHARES

- [ ] Sole Proprietorship
- [ ] Private Limited (Pte Ltd)
- [ ] Partnership
- [ ] Listed Company Shares
- [ ] Private Company Shares

STEP 2 Map out your people

List the names of decision-makers and people who matter to you.

- [ ] **BENEFICIARIES**
  Who receives your estate? ______________
- [ ] **EXECUTOR**
  Carries out your will ______________
- [ ] **TRUSTEE**
  Manages assets if you set up a trust ______________
- [ ] **GUARDIAN**
  For children under 21 ______________
- [ ] **DONEE(S) FOR LPA**
  If mentally incapacitated ______________

STEP 3 State your wishes

What do you want to happen with your assets?

I WANT TO SPLIT MY ESTATE

- [ ] Equally
- [ ] Custom: ______________

I WISH TO GIVE

- [ ] Lump sum
- [ ] Periodic / Delayed
- [ ] Conditional (age, milestones)

I WANT TO SET ASIDE FUNDS FOR

- [ ] Children's education
- [ ] Elder care
- [ ] Charitable giving

STEP 4 Prepare Your estate plan

Choose the estate planning instruments you wish to prepare

I WANT TO PREPARE

- [ ] Will
- [ ] Testamentary Trust
- [ ] LPA (Form 1)
- [ ] LPA (Form 2)

STEP 5

Reach out to us!

Send your checklist to
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Our team will get in touch to guide you through your next steps.