

Estate Directory

The Estate Directory is designed to help you organize your critical personal information to be used at a time when it will be needed the most. Documenting this information now will prepare others to assist with your affairs in the event of a severe disability or untimely death. The Estate Directory will help to quickly locate the important people in your life as well as your important personal papers at a time when things are already complicated.

The benefit of this type of advance planning is enormous and people who would normally be overlooked will be immediately contacted. Take time and care to complete these details accurately and thoroughly. When the time comes to use this directory, you will probably not be able to provide any input.

Name: _____ Last Update: _____

NRIC: _____ Passport No: _____

EPF No: _____ Socso No: _____

Income Tax No: _____

Relatives to Notify

Relatives will normally notify each other quite rapidly in the event of an emergency. Most people simply list the few keys relatives that will notify the rest. We suggest you list your children, parents and perhaps brothers and sisters on this page.

Name	Address	Contact No

Advisors to Consult or Notify:

	Name	Contact No
Guardian	1. 2.	
Executor	1. 2.	
Employer		
Insurance Agent	1. 2.	
Accountant	1. 2.	
Lawyer	1. 2.	
Doctor	1. 2.	
Others	1. 2.	

Location of Important Documents

Filing systems for important documents and information are often arranged to suit personal need and are not necessarily as clear to another person. Begin by identifying where your home, office and safe keeping files are located. Then identify in which location each specific document can be found. Use “Other” and specify if one of these 3 locations is not applicable.

Document in my home are located:

Document in my office are located:

Safe Deposit Box is located at:

Bank _____

Branch Address _____

Box No _____

Use 1 of these 3 locations detailed above to identify where the following documents may be found.

H = Home **O** = Office **SD** = Safe Deposit Box **X** = Others

Documents	Kept At	Documents	Kept At
Will (original & copy)		Investment documents	
Income Tax Returns		CDS Account No.	
Marriage documents		Credit cards files	
Insurance Policies		Business Agreements	
Bank Passbooks		Trust Deed	
Property, Land Titles, Grants and Deeds		Others	

Information On

Bank Account No Branch	Type
Bank Account No Branch	Type
Bank Account No Branch	Type
Bank Account No Branch	Type
Bank Account No Branch	Type
CDS Account No	1. 2.
Unit Trust Account Company - 1 Company - 2 Company - 3	

Insurance Policies

Policy No	Company	Beneficiaries
1.		
2.		
3.		
4.		
5.		
6.		
7.		

Note:

1. Please keep this Estate Directory so that it can be easily located.
2. Inform a loved one, where it is kept.
3. You do not need to write down details eg. insurance policy amounts, but at least which company you use and where the documents are kept.
4. Remember to update this list when there are changes or at least once every 6 months.