

## DOCUMENTS TO BE SUBMITTED FOR DRAFTING (COMPULSORY)

Incomplete submission of documents required will delay drafting of the Will

Rockwills Trustee Berhad prepares only wills for NON-MUSLIM

Passed to RWT	DOCUMENTS
<input type="checkbox"/>	Copy of NRIC / Passport (for foreigner/PR of Malaysia) of the Testator
<input type="checkbox"/>	Letter of Engagement (LOE) properly filled and signed by the Testator stating the name of the REP and deposit amount
<input type="checkbox"/>	Deposit (min. RM480; OR the amount stated in the LOE)

## DETAILS OF ROCKWILLS ESTATE PLANNER (REP) (COMPULSORY)

Name		Franchise code	
Email		HP number	

## STATUS OF THE WILL (COMPULSORY)

**Malaysian Will:**

Choose one:

- New Malaysia Will  Rewrite Malaysia Will

Choose one:

- Malaysia Will to cover worldwide assets  Malaysia Will to cover assets in Malaysia only (testator NOT domiciled in Malaysia)

**Singapore Will: (covers only assets in Singapore and to be reviewed by Precepts Trustee Ltd)**

Choose one:

- New Singapore Will  Rewrite Singapore Will

Choose one:

- Singapore Will to cover worldwide assets  Singapore Will to cover assets in Singapore only (testator NOT domiciled in Singapore)

## SECTION 1: DETAILS OF THE TESTATOR (COMPULSORY)

4@

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Nationality \_\_\_\_\_
- 4) Date of birth \_\_\_\_\_ 5) Marital Status \_\_\_\_\_
- 6) Main Address \_\_\_\_\_
- 7) Correspondence Address \_\_\_\_\_
- 8) Email \_\_\_\_\_ 9) HP no. \_\_\_\_\_
- 10) Sex  Male  Female 11) Domicile \_\_\_\_\_  
(if not stated, deemed to be Malaysian domicile)
- 12) Can the Testator read and understand English?  
 Yes  No, the Will will be read and explained to the Testator:  
 a) Language/dialect \_\_\_\_\_  
 b) Reader's name \_\_\_\_\_



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

Reader's NRIC No \_\_\_\_\_

13) Signing Will by  Signature  Thumbprint: *state reason(s) below* - \_\_\_\_\_

14) Special conditions  Illiterate  Blind  Others: \_\_\_\_\_

## SECTION 2: APPOINTMENT OF EXECUTOR AND TRUSTEE (COMPULSORY)

### ALERTS

- Recommend Rockwills Trustee Berhad (RWT) as the executor who is experienced and have specialist staff to handle the administration of the testator's estate.
- If an individual executor dies midway through administration of an estate, the beneficiaries have to choose an administrator they all agree on to apply for Letters of Administration de bonis non with Will Annexed, which can be troublesome and open to dispute.
- If RWT is the executor, suggest (i) Prepaid for discount on estate and trust administration fees; and (ii) Lifetime Plus for RWT to subsidize up to RM6,000 as legal fees to apply for probate when RWT act as executor.
- If the testator wants the beneficiaries to receive funds without having to wait for Probate, then suggest testator set up Insurance Trust or Declaration Trust

### ROCKWILLS TRUSTEE BERHAD AS EXECUTOR AND TRUSTEE

Sole  Last Substitute  Reappointing RWT as Executor (appointment fee waived)

### APPOINTMENT OF INDIVIDUAL AS EXECUTOR AND TRUSTEE (if applicable)

- If joint executors and trustees are appointed, please be aware that if there is any conflict/disagreement between them, it will cause delay in the administration of the estate and distribution of assets.
- Each joint executor and trustee will be liable jointly and severally with the other joint executors and trustees.

#### Individual Executor & Trustee No. 1

1@

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*
- 4) Main Address \_\_\_\_\_

#### Individual Executor & Trustee No. 2

Substitute  Joint

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*
- 4) Main Address \_\_\_\_\_

#### Individual Executor & Trustee No. 3

1@

Substitute  Joint

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*
- 4) Main Address \_\_\_\_\_



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

## Individual Executor & Trustee No. 4

Substitute  Joint

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*
- 4) Main Address \_\_\_\_\_

### Additional instructions/notes on executor and trustee appointment:

### ALLOWANCE OF THE INDIVIDUAL EXECUTOR AND TRUSTEE

Is the Individual Executor and Trustee to be paid an allowance?

No

Yes

- a) Amount \_\_\_\_\_ b)  One-off 1@  Regular \_\_\_\_\_ 2@  
*(state frequency)*
- c) Inflation rate \_\_\_\_\_ % per annum 1@

### SECTION 3: APPOINTMENT OF DIGITAL FACILITATOR (FOR DIGITAL ASSETS ONLY)

#### ALERTS

- RWT CANNOT be appointed as Digital Facilitator
- The Executor named in Section 2 will NOT automatically be the Digital Facilitator unless appointed in Section 3
- **NO joint** Digital Facilitator appointments are allowed
- Persons named below as Digital Facilitator acts in order of priority

#### Digital Facilitator No. 1

1@

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*
- 4) Main Address \_\_\_\_\_
- 5) Email \_\_\_\_\_
- 6) Contact number Home: \_\_\_\_\_ Mobile: \_\_\_\_\_

#### Digital Facilitator No. 2

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*
- 4) Main Address \_\_\_\_\_
- 5) Email \_\_\_\_\_
- 6) Contact number Home: \_\_\_\_\_ Mobile: \_\_\_\_\_

## SECTION 4: APPOINTMENT OF GUARDIAN FOR MINOR CHILDREN (OPTIONAL)

### ALERTS

Recommended that the guardian be paid an allowance either in the Will or paid by way of Insurance Trust or Declaration Trust

- Does not want the spouse / ex-spouse to be the sole Guardian of the children and to appoint the person(s) below as Guardian
- To appoint the persons named below as Guardian upon death of testator and spouse (who are parents of the minor children)

#### Guardian No. 1

1@

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*
- 4) Main Address \_\_\_\_\_

#### Guardian No. 2

- Substitute  Joint

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*
- 4) Main Address \_\_\_\_\_

### ALLOWANCE TO THE GUARDIAN (IF GIVING SUCH ALLOWANCE)

This allowance is remuneration/salary to the guardian and NOT for it to be used for the minor children

- 1) Source \_\_\_\_\_
- 2) Payment amount RM \_\_\_\_\_
- 3) Payment frequency  One-off 1@  Regular \_\_\_\_\_ 2@  
*(state frequency)*
- 4) For Monthly/Other regular payments, allowance to Guardian is until the youngest child reaches what age? (*maximum is 21 years old*) \_\_\_\_\_ (age)
- 5) If payment to be inflation proof, what is the rate from the date of the Will? \_\_\_\_\_ % p.a. 1@

## SECTION 5: PAYMENT OF DEBTS OF THE ESTATE (RECOMMENDED)

### ALERTS

- The testator may state his preference which assets are to be used first to pay debts of the estate
- If the testator allocates any assets to be used to pay debts, these assets listed below MUST NOT be given to any beneficiaries because it will be used to pay debts

- The executor is to use the assets below in the order of priority to pay debts of the estate:

Order No.	Asset to be used to pay debts	
1 <sup>st</sup>		1@
2 <sup>nd</sup>		1@



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

3 <sup>rd</sup>		1@
4 <sup>th</sup>		1@
5 <sup>th</sup>		1@

## SECTION 6: WHO ARE THE BENEFICIARIES? (COMPULSORY)

### BENEFICIARY NO. 1

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*

### BENEFICIARY NO. 2

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*

### BENEFICIARY NO. 3

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*

### BENEFICIARY NO. 4

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*

### BENEFICIARY NO. 5

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*

### BENEFICIARY NO. 6

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*

### BENEFICIARY NO. 7

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

*If not Malaysian, state country of Passport or ID*

## BENEFICIARY NO. 8

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*

## BENEFICIARY NO. 9

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*

## BENEFICIARY NO. 10

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*

## BENEFICIARY NO. 11

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*

## BENEFICIARY NO. 12

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*

## BENEFICIARY NO. 13

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*

## BENEFICIARY NO. 14

- 1) Full Name \_\_\_\_\_
- 2) NRIC / Passport No. \_\_\_\_\_ 3) Relationship to Testator \_\_\_\_\_  
*If not Malaysian, state country of Passport or ID*

*[Add a schedule if there are additional beneficiaries.]*



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

## SECTION 7: DISTRIBUTION OF ASSETS (COMPULSORY)

### ALERTS

- If the beneficiaries in the Will are minor or old aged or have special needs where he/she needs funds quickly without having to wait for Probate, please advise testator to do Insurance Trust or Declaration Trust for the insurance policy, unit trust and bank accounts
- If the testator is a substantial/majority shareholder in a Sdn Bhd, he should create a Declaration Trust for the shares to be transferred quickly to the beneficiaries without having to wait for Probate, so that they can take charge and manage the company.

### Will the assets be listed to be given to beneficiaries?

- Yes, please go to Section 8: Specific gifts (recommended)
- No, please go to Section 10: Residue estate (not recommended because of difficulty to locate assets for probate)

## SECTION 8: SPECIFIC GIFTS (OPTIONAL)

Unless stated otherwise, each asset is 1@ and each level of substitute beneficiary(ies) is 1@ [starting from the 2<sup>nd</sup> substitute beneficiary(ies)]

### 1) ALL BANK ACCOUNTS

1@

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

#### Death of a Main Beneficiary, who gets his/her share?

- To the surviving main beneficiaries in equal shares (default clause)
- To the surviving main beneficiaries in proportion to their own shares
- To the beneficiary's own children equally
- To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

#### Death of a Substitute Beneficiary No. 1, who gets his/her share?

- To the surviving substitute beneficiaries in equal shares (default clause)
- To the surviving substitute beneficiaries in proportion to their own shares
- To the beneficiary's own children equally 1@
- To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9 1@

### 2) ALL CRYPTOCURRENCY / E-WALLET / FINANCIAL DIGITAL ASSETS ACCOUNTS

The Digital Asset Memorandum should be filled ASAP and kept safely at a place where the Digital Facilitator would be able to find it and recover the Digital Assets

Service Provider		State type of accounts	1@
------------------	--	------------------------	----

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

#### Death of a Main Beneficiary, who gets his/her share?

- To the surviving main beneficiaries in equal shares (default clause)
- To the surviving main beneficiaries in proportion to their own shares
- To the beneficiary's own children equally
- To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- To the surviving substitute beneficiaries in equal shares (default clause) 1@  To the surviving substitute beneficiaries in proportion to their own shares 1@
- To the beneficiary's own children equally 1@  To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9 1@

### 3) ALL UNIT TRUST/MUTUAL FUND INVESTMENTS

1@

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

- To the surviving main beneficiaries in equal shares (default clause)  To the surviving main beneficiaries in proportion to their own shares
- To the beneficiary's own children equally  To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- To the surviving substitute beneficiaries in equal shares (default clause)  To the surviving substitute beneficiaries in proportion to their own shares
- To the beneficiary's own children equally 1@  To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9 1@

### 4) ALL INSURANCE POLICIES [only for those without nomination or under Paragraph 6(1) nomination (non-trust nomination)]

1@

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

- To the surviving main beneficiaries in equal shares (default clause)  To the surviving main beneficiaries in proportion to their own shares
- To the beneficiary's own children equally  To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- To the surviving substitute beneficiaries in equal shares (default clause)  To the surviving substitute beneficiaries in proportion to their own shares
- To the beneficiary's own children equally 1@  To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9 1@



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

## 5) ALL INSURANCE POLICIES [only for those where nomination fails]

1@

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

To the surviving main beneficiaries in equal shares (default clause)       To the surviving main beneficiaries in proportion to their own shares

To the beneficiary's own children equally       To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares

To the beneficiary's own children equally      1@       To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@

## 6) SPECIFIC BANK ACCOUNTS / UNIT TRUSTS / MUTUAL FUNDS / CRYPTOCURRENCY / E-WALLET

### JOINT ACCOUNTS:

Give joint bank accounts to respective joint account holder(s)      1@

Give joint unit trust accounts to respective joint account holder(s)      1@

### SPECIFIC ACCOUNTS (fill up details below):

A)	Service Provider/Financial institution	Type of account & no	1@

Joint account      *(By default if not ticked, it is treated as a sole name account)*

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

To the surviving main beneficiaries in equal shares (default clause)       To the surviving main beneficiaries in proportion to their own shares

To the beneficiary's own children equally       To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares

To the beneficiary's own children equally      1@       To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

<b>B)</b>	<b>Service Provider/Financial institution</b>		<b>Type of account &amp; no</b>	1@
-----------	---	--	---------------------------------	----

Joint account *(By default if not ticked, it is treated as a sole name account)*

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

To the surviving main beneficiaries in equal shares (default clause)       To the surviving main beneficiaries in proportion to their own shares

To the beneficiary's own children equally       To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares

To the beneficiary's own children equally      1@       To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@

<b>C)</b>	<b>Service Provider/Financial institution</b>		<b>Type of account &amp; no</b>	1@
-----------	---	--	---------------------------------	----

Joint account *(By default if not ticked, it is treated as a sole name account)*

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

To the surviving main beneficiaries in equal shares (default clause)       To the surviving main beneficiaries in proportion to their own shares

To the beneficiary's own children equally       To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares

To the beneficiary's own children equally      1@       To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

## 7) SPECIFIC INSURANCE POLICIES [only for those without nomination or under Paragraph 6(1) nomination (non-trust nomination)]

<b>A)</b>	<b>Insurance Company</b>		<b>Policy No</b>	1@
-----------	--------------------------	--	------------------	----

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

- |   |  |
|---|--|
| <input type="checkbox"/> To the surviving main beneficiaries in equal shares (default clause) | <input type="checkbox"/> To the surviving main beneficiaries in proportion to their own shares         |
| <input type="checkbox"/> To the beneficiary's own children equally                            | <input type="checkbox"/> To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9 |

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- |   |  |
|---|--|
| <input type="checkbox"/> To the surviving substitute beneficiaries in equal shares (default clause) | <input type="checkbox"/> To the surviving substitute beneficiaries in proportion to their own shares           |
| <input type="checkbox"/> To the beneficiary's own children equally      1@                          | <input type="checkbox"/> To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@ |

<b>B)</b>	<b>Insurance Company</b>		<b>Policy No</b>	1@
-----------	--------------------------	--	------------------	----

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

- |   |  |
|---|--|
| <input type="checkbox"/> To the surviving main beneficiaries in equal shares (default clause) | <input type="checkbox"/> To the surviving main beneficiaries in proportion to their own shares         |
| <input type="checkbox"/> To the beneficiary's own children equally                            | <input type="checkbox"/> To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9 |

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- |   |  |
|---|--|
| <input type="checkbox"/> To the surviving substitute beneficiaries in equal shares (default clause) | <input type="checkbox"/> To the surviving substitute beneficiaries in proportion to their own shares           |
| <input type="checkbox"/> To the beneficiary's own children equally      1@                          | <input type="checkbox"/> To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@ |



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

## 8) SPECIFIC INSURANCE POLICIES [only for those where nomination fails]

<b>A)</b>	<b>Insurance Company</b>		<b>Policy No</b>	1@
-----------	--------------------------	--	------------------	----

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

- |   |  |
|---|--|
| <input type="checkbox"/> To the surviving main beneficiaries in equal shares (default clause) | <input type="checkbox"/> To the surviving main beneficiaries in proportion to their own shares         |
| <input type="checkbox"/> To the beneficiary's own children equally                            | <input type="checkbox"/> To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9 |

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- |   |  |
|---|--|
| <input type="checkbox"/> To the surviving substitute beneficiaries in equal shares (default clause) | <input type="checkbox"/> To the surviving substitute beneficiaries in proportion to their own shares           |
| <input type="checkbox"/> To the beneficiary's own children equally      1@                          | <input type="checkbox"/> To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@ |

<b>B)</b>	<b>Insurance Company</b>		<b>Policy No</b>	1@
-----------	--------------------------	--	------------------	----

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

- |   |  |
|---|--|
| <input type="checkbox"/> To the surviving main beneficiaries in equal shares (default clause) | <input type="checkbox"/> To the surviving main beneficiaries in proportion to their own shares         |
| <input type="checkbox"/> To the beneficiary's own children equally                            | <input type="checkbox"/> To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9 |

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- |   |  |
|---|--|
| <input type="checkbox"/> To the surviving substitute beneficiaries in equal shares (default clause) | <input type="checkbox"/> To the surviving substitute beneficiaries in proportion to their own shares           |
| <input type="checkbox"/> To the beneficiary's own children equally      1@                          | <input type="checkbox"/> To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@ |

## 9) EMPLOYEES PROVIDENT FUND (EPF) (where nomination fails)

1@			
Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share





# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares

- To the beneficiary's own children equally      1@       To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@

## 11) ALL JEWELLERY

*Where jewelry is of considerable value or of emotional significance, it is best to identify it by tabulating, describing it and photograph it.*

- Give all jewellery to the beneficiaries stated below      1@

- Sell all the jewellery and proceeds to be given to the beneficiaries stated below      1@

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

- To the surviving main beneficiaries in equal shares (default clause)       To the surviving main beneficiaries in proportion to their own shares

- To the beneficiary's own children equally       To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares

- To the beneficiary's own children equally      1@       To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@

## 12) SPECIFIC ITEMS

<b>A)</b>	<b>Details of item</b>	1@
-----------	------------------------	----

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

- To the surviving main beneficiaries in equal shares (default clause)       To the surviving main beneficiaries in proportion to their own shares

- To the beneficiary's own children equally       To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares

- To the beneficiary's own children equally      1@       To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

<b>B)</b>	<b>Details of item</b>	1@
-----------	------------------------	----

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

To the surviving main beneficiaries in equal shares (default clause)       To the surviving main beneficiaries in proportion to their own shares

To the beneficiary's own children equally       To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares

To the beneficiary's own children equally      1@       To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@

### 13) SPECIFIC DIGITAL ASSET (NON-CRYPTOCURRENCY / E-WALLET)

- Each non-cryptocurrency can be given to only 1 beneficiary as it cannot be shared such as social media, cloud storage and email accounts.
- The Digital Asset Memorandum should be filled ASAP and kept safely at a place where the Digital Facilitator would be able to find it and recover the Digital Assets

<b>A)</b>	<b>Details of item</b>	1@
-----------	------------------------	----

Main Beneficiary	Substitute Beneficiary No. 1	Substitute Beneficiary No. 2	1@

<b>B)</b>	<b>Details of item</b>	1@
-----------	------------------------	----

Main Beneficiary	Substitute Beneficiary No. 1	Substitute Beneficiary No. 2	1@

<b>C)</b>	<b>Details of item</b>	1@
-----------	------------------------	----

Main Beneficiary	Substitute Beneficiary No. 1	Substitute Beneficiary No. 2	1@



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

## 14) SALE OF ASSET AND DISTRIBUTION OF SALE PROCEEDS

<b>A)</b>	<b>Details of item</b>	1@
-----------	------------------------	----

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

To the surviving main beneficiaries in equal shares (default clause)       To the surviving main beneficiaries in proportion to their own shares

To the beneficiary's own children equally       To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares

To the beneficiary's own children equally      1@       To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@

<b>B)</b>	<b>Details of item</b>	1@
-----------	------------------------	----

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

To the surviving main beneficiaries in equal shares (default clause)       To the surviving main beneficiaries in proportion to their own shares

To the beneficiary's own children equally       To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares

To the beneficiary's own children equally      1@       To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@

# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

## 15) ALL IMMOVABLE PROPERTIES

*It is recommended to state each property in the will rather than state as all immovable properties as the executor will have difficulty locating the properties owned by the testator when applying for probate* 1@

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

To the surviving main beneficiaries in equal shares (default clause)  To the surviving main beneficiaries in proportion to their own shares

To the beneficiary's own children equally  To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

To the surviving substitute beneficiaries in equal shares (default clause)  To the surviving substitute beneficiaries in proportion to their own shares

To the beneficiary's own children equally 1@  To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9 1@

## 16) SPECIFIC IMMOVABLE PROPERTIES

<b>A)</b>	<b>Address of the property</b>		1@
	<b>Title details</b>		

*State details such as Geran, Pajakan, HS(M), HS(D), PT No/Lot No. Mukim, Daerah, Negeri or provide copy of the title or Sale & Purchase Agreement, if unsure*

Sole named  Jointly owned

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

To the surviving main beneficiaries in equal shares (default clause)  To the surviving main beneficiaries in proportion to their own shares

To the beneficiary's own children equally  To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

To the surviving substitute beneficiaries in equal shares (default clause)  To the surviving substitute beneficiaries in proportion to their own shares

To the beneficiary's own children equally 1@  To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9 1@



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

<b>B)</b>	<b>Address of the property</b>	1@
	<b>Title details</b>	

*State details such as Geran, Pajakan, HS(M), HS(D), PT No/Lot No. Mukim, Daerah, Negeri or provide copy of the title or Sale & Purchase Agreement, if unsure*

Sole named                       Jointly owned

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

To the surviving main beneficiaries in equal shares (default clause)                       To the surviving main beneficiaries in proportion to their own shares

To the beneficiary's own children equally                       To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

To the surviving substitute beneficiaries in equal shares (default clause)                       To the surviving substitute beneficiaries in proportion to their own shares

To the beneficiary's own children equally                      1@                       To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9                      1@

<b>C)</b>	<b>Address of the property</b>	1@
	<b>Title details</b>	

*State details such as Geran, Pajakan, HS(M), HS(D), PT No/Lot No. Mukim, Daerah, Negeri or provide copy of the title or Sale & Purchase Agreement, if unsure*

Sole named                       Jointly owned

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

To the surviving main beneficiaries in equal shares (default clause)                       To the surviving main beneficiaries in proportion to their own shares

To the beneficiary's own children equally                       To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

To the surviving substitute beneficiaries in equal shares (default clause)                       To the surviving substitute beneficiaries in proportion to their own shares

To the beneficiary's own children equally                      1@                       To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9                      1@



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

## 17) ALL LISTED SECURITIES ON BURSA MALAYSIA

1@

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

- |   |  |
|---|--|
| <input type="checkbox"/> To the surviving main beneficiaries in equal shares (default clause) | <input type="checkbox"/> To the surviving main beneficiaries in proportion to their own shares         |
| <input type="checkbox"/> To the beneficiary's own children equally                            | <input type="checkbox"/> To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9 |

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- |   |   |
|---|---|
| <input type="checkbox"/> To the surviving substitute beneficiaries in equal shares (default clause) | <input type="checkbox"/> To the surviving substitute beneficiaries in proportion to their own shares      |
| <input type="checkbox"/> To the beneficiary's own children equally 1@                               | <input type="checkbox"/> To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9 1@ |

## 18) SPECIFIC ACCOUNT FOR LISTED SECURITIES – BURSA MALAYSIA or OVERSEAS STOCK EXCHANGES

<b>A)</b>	<b>Stock Exchange</b>		<b>Account no</b>		1@
-----------	-----------------------	--	-------------------	--	----

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

- |   |  |
|---|--|
| <input type="checkbox"/> To the surviving main beneficiaries in equal shares (default clause) | <input type="checkbox"/> To the surviving main beneficiaries in proportion to their own shares         |
| <input type="checkbox"/> To the beneficiary's own children equally                            | <input type="checkbox"/> To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9 |

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- |   |   |
|---|---|
| <input type="checkbox"/> To the surviving substitute beneficiaries in equal shares (default clause) | <input type="checkbox"/> To the surviving substitute beneficiaries in proportion to their own shares      |
| <input type="checkbox"/> To the beneficiary's own children equally 1@                               | <input type="checkbox"/> To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9 1@ |

<b>B)</b>	<b>Stock Exchange</b>		<b>Account no</b>		1@
-----------	-----------------------	--	-------------------	--	----

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

Death of a Main Beneficiary, who gets his/her share?

- To the surviving main beneficiaries in equal shares (default clause)       To the surviving main beneficiaries in proportion to their own shares
- To the beneficiary's own children equally       To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares
- To the beneficiary's own children equally      1@       To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@

## 19) ALL BUSINESSES

*If the testator is a substantial/majority shareholder in a Sdn Bhd, it is recommended to have a Declaration Trust for the shares to be transferred quickly avoiding the need for Probate*

- All shares in Sdn Bhd/unlisted Bhd       All partnership interests       All sole proprietorships
- Each type of business chosen/ticked is 1@

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

- To the surviving main beneficiaries in equal shares (default clause)       To the surviving main beneficiaries in proportion to their own shares
- To the beneficiary's own children equally       To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares
- To the beneficiary's own children equally      1@       To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@

## 20) SPECIFIC BUSINESS TO WILL AWAY

### ALERTS

- If the testator is a substantial/majority shareholder in a Sdn Bhd, it is recommended to have a Declaration Trust for the shares to be transferred quickly avoiding the need for Probate or setup a Family Business Succession Trust*
- If the shareholders/partners are not family members but friends, it is recommended for the testator and his partners to consider setting up a Buy-Sell Trust after finalizing the will*

<b>A)</b>	<b>Name of business</b>		<b>Reg/Co no</b>		1@
-----------	-------------------------	--	------------------	--	----

- Shares in Sdn Bhd/unlisted Bhd       Partnership interests       Sole proprietorships

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

Death of a Main Beneficiary, who gets his/her share?

To the surviving main beneficiaries in equal shares (default clause)  To the surviving main beneficiaries in proportion to their own shares

To the beneficiary's own children equally  To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

To the surviving substitute beneficiaries in equal shares (default clause)  To the surviving substitute beneficiaries in proportion to their own shares

To the beneficiary's own children equally 1@  To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9 1@

<b>B)</b>	<b>Name of business</b>		<b>Reg/Co no</b>	1@
-----------	-------------------------	--	------------------	----

Shares in Sdn Bhd/unlisted Bhd  Partnership interests  Sole proprietorships

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

To the surviving main beneficiaries in equal shares (default clause)  To the surviving main beneficiaries in proportion to their own shares

To the beneficiary's own children equally  To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9

Death of a Substitute Beneficiary No. 1, who gets his/her share?

To the surviving substitute beneficiaries in equal shares (default clause)  To the surviving substitute beneficiaries in proportion to their own shares

To the beneficiary's own children equally 1@  To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9 1@

<b>C)</b>	<b>Name of business</b>		<b>Reg/Co no</b>	1@
-----------	-------------------------	--	------------------	----

Shares in Sdn Bhd/unlisted Bhd  Partnership interests  Sole proprietorships

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

To the surviving main beneficiaries in equal shares (default clause)  To the surviving main beneficiaries in proportion to their own shares

To the beneficiary's own children equally  To the beneficiaries as Substitute Beneficiary(ies) No. 1 listed in Section 9



## ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares
- To the beneficiary's own children equally      1@       To the beneficiaries as Substitute Beneficiary(ies) No. 2 listed in Section 9      1@

**21) ADDITIONAL INSTRUCTIONS (unless otherwise stated, each instruction is 1@)**



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

## SECTION 9: SUBSTITUTE BENEFICIARIES FOR SECTION NO. 8

*This section is used to state who are the Substitute Beneficiaries for the Section 8. State the relevant Asset followed by who would be the Substitute Beneficiary No.1 and Share. If there is/are Substitute Beneficiary No. 2, please state the name and Share. The full details of the Beneficiaries are to be stated in Section 6.  
(If there is more than one beneficiary in the same tier and if one of them predeceased, by default, the deceased beneficiary's portion will be given to the surviving beneficiaries equally)*

Asset (stated in Section 8)	Substitute Beneficiary No. 1 (state name)	Share	Substitute Beneficiary No. 2 (state name)	Share



## ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

Asset (state in Section 8)	Substitute Beneficiary No. 1 (state name)	Share	Substitute Beneficiary No. 2 (state name)	Share



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

Asset (state in Section 8)	Substitute Beneficiary No. 1 ( <i>state name</i> )	Share	Substitute Beneficiary No. 2 ( <i>state name</i> )	Share



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

## SECTION 10: RESIDUARY ESTATE (COMPULSORY)

1@

Name of Main Beneficiary(ies)	Share	Name of Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

To the surviving main beneficiaries in equal shares (default clause)       To the surviving main beneficiaries in proportion to their own shares

To the beneficiary's own children equally      1@       To the beneficiaries listed below as Substitute Beneficiary(ies) No. 1      1@

Name of Substitute Beneficiary(ies) No. 1	Share	Name of Substitute Beneficiary(ies) No. 1	Share

Death of a Substitute Beneficiary No. 1, who gets his/her share?

To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares

To the beneficiary's own children equally      1@       To the beneficiaries listed below as Substitute Beneficiary(ies) No. 2      1@

Name of Substitute Beneficiary(ies) No. 2	Share	Name of Substitute Beneficiary(ies) No. 2	Share

Death of a Substitute Beneficiary No. 2, who gets his/her share?

To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares

To the beneficiary's own children equally      1@

## SECTION 11: POWERS OF THE EXECUTOR AND TRUSTEE (OPTIONAL)

Power to insure assets      1@       Investment preference:      1@  
 Fixed deposit       Discretion of trustee

Others:

Other powers:  Each power is 1@

## SECTION 12: OTHER MATTERS (OPTIONAL)

Commorientes: numbers of days for beneficiary(ies) to survive before inheriting  Days 1@

Statement to exclude dependents: if the spouse or son below 21 years old or unmarried daughter or disabled child under the Inheritance (Family Provision) Act 1971 1@

a) Who is excluded? Full name \_\_\_\_\_  
 NRIC No. \_\_\_\_\_  
 Relationship \_\_\_\_\_

b) Reason(s) for exclusion

Children in the Will to include (when the names of the children are not stated in the Will) 1@  
 Children en ventre sa mere (unborn child of a MALE testator)

Of a particular spouse: Spouse's full name: \_\_\_\_\_  
 NRIC No. \_\_\_\_\_

Will is NOT to be revoked in expectation of marriage to: 1@  
 Full name of fiancé/fiancée \_\_\_\_\_  
 NRIC/Passport No \_\_\_\_\_ Nationality: \_\_\_\_\_

Funeral arrangements & final resting place 1@  
 Burial  Cremation  Final resting place: \_\_\_\_\_

Payment of final resting place from: 1@  
 Residue  Specific asset: \_\_\_\_\_

***Prepaid bereavement care services from Semenyih Memorial Hills, Nirvana Memorial, Xiao En and Universal Memorial Park are available from Rockwills Business Solutions Sdn Bhd (RBS) and can be promoted by the REP***

Terms of endearment i.e. personal messages of love from the testator to the beneficiaries and/or family members Each term is 1@

Additional instructions Each instruction is 1@

# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

## SECTION 13: TESTAMENTARY TRUST (OPTIONAL) – TAKES EFFECT AFTER PAYMENT OF DEBTS

### A) MOVABLE ASSET(S) PLACED INTO THE TESTAMENTARY TRUST

1) IS THE TRUSTEE TO USE THE BENEFICIARIES' SHARE TO PAY FOR THE PURPOSE OF THE TRUST?

YES, please state below % as their Share     
  NO, it's a pool fund for all beneficiaries to use without limit (no need to state below % as their Share)

2) WHO IS THE BENEFICIARY(IES)? 1@

Full name	Share	Full name	Share

3) WHAT IS THE PURPOSE?

Maintenance       Education       Medical  
 Others: \_\_\_\_\_

4) WHAT MOVABLE ASSET(S) TO BE PLACED INTO THE TESTAMENTARY TRUST?

All entitlement in movable 1@  
 Specific movable asset: *(please state)* 1@ for each asset

5) WHEN WILL THE TRUST END? 1@

Until the youngest beneficiary attains the age of : \_\_\_\_\_  
 For the period of \_\_\_\_\_ years  
 Others *(please state)*: \_\_\_\_\_

6) DISTRIBUTION TO BENEFICIARIES 1@

Discretion of the trustee based on the need of each beneficiary to fulfill the purpose stated above  
 OR  
 Fixed amount of: RM \_\_\_\_\_ every \_\_\_\_\_ *(payment frequency)*  
 The above amount is to be inflation adjusted  
 Use the rate of \_\_\_\_\_ % p.a. *(optional)*

OR

Each beneficiary is to receive from their entitlement, the following:  
*(do NOT fill up if discretionary distribution by Trustee)*

i) Please choose one:		Amount (RM)
<input type="checkbox"/> Spouse	<input type="checkbox"/> Parents	(1@ pp = 1@ per per class)
<input type="checkbox"/> Others: <i>(please state below)</i>		
<input type="checkbox"/> Monthly maintenance until _____ age		1@ pp
<input type="checkbox"/> Annual maintenance until _____ age (starts on 1 Jan or next workday)		1@ pp
<input type="checkbox"/> Medical expenses until _____ age		1@ pp
<input type="checkbox"/> Annual vacation (max)		1@ pp
<input type="checkbox"/> Gift for CNY/Christmas/Hari Raya until _____ age		1@ pp
<input type="checkbox"/> Gift for birthday until _____ age		1@ pp

## ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

[ ]	Gift for: <i>(state it below)</i>	1@ pp
<b>ii) Children</b>		<b>Amount (RM)</b>
[ ]	Set aside medical expenses for each child <i>(payment will be made as and when needed)</i>	1@
[ ]	Annual vacation (max)	1@
[ ]	Gift for CNY/Christmas/Hari Raya until _____ age	1@
[ ]	Gift for birthday until _____ age	1@
[ ]	Gift for: <i>(state event below)</i>	1@
[ ]	Annual maintenance until _____ age <i>(starting from 1<sup>st</sup> January or next working day)</i>	1@
[ ]	Monthly maintenance <i>(state details below)</i> :	
	• Age _____ to _____	1@
	• Age _____ to _____	1@
	• Age _____ to _____	1@
	• Age _____ to _____	1@
[ ]	Wedding allowance for each child:	
	• 1 <sup>st</sup> marriage	1@
	• 2 <sup>nd</sup> marriage	1@
[ ]	Allocation for education for each child until the age of _____	1@
[ ]	To reward for academic achievement of each child:	
	• Primary: achieve grade of _____	1@
	• Secondary: achieve grade of _____	1@
	• Pre-university/College/Matriculation: achieve grade of _____	1@
	• 1 <sup>st</sup> University degree/Professional qualification: achieve grade of _____	1@
[ ]	Gift for: <i>(state it below)</i>	1@

- 7) POWERS TO TRUSTEE 1@
- [ ] Sell the assets and proceeds form part of the Testamentary Trust [ ] When necessary [ ] Must sell
- [ ] Investment preferences
- [ ] Fixed deposit [ ] Discretion of trustee
- [ ] Others: \_\_\_\_\_

# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

8) IF THE EXECUTOR IS NOT THE TRUSTEE, THE TRUSTEE WILL BE: Every 2 trustees is 1@

Full name	NRIC/Passport No	Relationship	Address

9) WHO WILL BENEFIT WHEN THE TRUST ENDS?

Main Beneficiary(ies)	Share	Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

- |   |   |
|---|---|
| <input type="checkbox"/> To the surviving main beneficiaries in equal shares (default clause) | <input type="checkbox"/> To the surviving main beneficiaries in proportion to their own shares  |
| <input type="checkbox"/> To the beneficiary's own children equally                            | <input type="checkbox"/> To the beneficiaries listed below as Substitute Beneficiary(ies) No. 1 |

Name of Substitute Beneficiary(ies) No. 1	Share	Name of Substitute Beneficiary(ies) No. 1	Share

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- |   |  |
|---|--|
| <input type="checkbox"/> To the surviving substitute beneficiaries in equal shares (default clause) | <input type="checkbox"/> To the surviving substitute beneficiaries in proportion to their own shares |
| <input type="checkbox"/> To the beneficiary's own children equally 1@                               | <input type="checkbox"/> To the beneficiaries listed below as Substitute Beneficiary(ies) No. 2 1@   |

Name of Substitute Beneficiary(ies) No. 2	Share	Name of Substitute Beneficiary(ies) No. 2	Share

Death of a Substitute Beneficiary No. 2, who gets his/her share?

- |   |  |
|---|--|
| <input type="checkbox"/> To the surviving substitute beneficiaries in equal shares (default clause) | <input type="checkbox"/> To the surviving substitute beneficiaries in proportion to their own shares |
| <input type="checkbox"/> To the beneficiary's own children equally 1@                               |  |

## **B) IMMOVABLE PROPERTIES PLACED INTO THE TESTAMENTARY TRUST**

1) WHAT IMMOVABLE ASSET(S) TO BE PLACED INTO THE TESTAMENTARY TRUST?

- All entitlement in immovable 1@  
 Specific immovable asset: *(please state)*

Address of the property	1@
Address of the property	1@

*State details such as Geran, Pajakan, HS(M), HS(D), PT No/Lot No. Mukim, Daerah, Negeri or provide copy of the title or Sale & Purchase Agreement, if unsure*

- Sole named  Jointly owned



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

2) BENEFICIARY(IES) HAVING THE RIGHT OF OCCUPATION 1@

<b>Full name</b>

Any rental payment?  
 No, rent free  
 Yes, pay at (and rental given to Beneficiary(ies) stated in no. 3):  
 Market rate  
 RM \_\_\_\_\_ monthly

3) CAN THE TRUSTEE LEASE/RENT OUT THE PROPERTY(IES)? 1@

- No
- Yes, the rental income shall form part of the \_\_\_\_\_ (state name of trust)
- Yes, state the beneficiary(ies) to receive rental income:

Main Beneficiary(ies)	Share	Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

- To the surviving main beneficiaries in equal shares (default clause)       To the surviving main beneficiaries in proportion to their own shares
- To the beneficiary's own children equally       To the beneficiaries listed below as Substitute Beneficiary(ies) No. 1

Name of Substitute Beneficiary(ies) No. 1	Share	Name of Substitute Beneficiary(ies) No. 1	Share

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares
- To the beneficiary's own children equally 1@       To the beneficiaries listed below as Substitute Beneficiary(ies) No. 2 1@

Name of Substitute Beneficiary(ies) No. 2	Share	Name of Substitute Beneficiary(ies) No. 2	Share

Death of a Substitute Beneficiary No. 2, who gets his/her share?

- To the surviving substitute beneficiaries in equal shares (default clause)       To the surviving substitute beneficiaries in proportion to their own shares
- To the beneficiary's own children equally 1@

4) WHEN WILL THE TRUST END? 1@

- Until the youngest beneficiary attains the age of: \_\_\_\_\_
- For the period of \_\_\_\_\_ years
- Others (please state): \_\_\_\_\_



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

5) Payment of quit rent, assessment, repair or maintenance of immovable paid from: State source: \_\_\_\_\_ 1@  
*(By default, rental income will be used to pay for the above)*

6) POWERS TO TRUSTEE 1@  
[ ] Sell the assets and proceeds form part of the Testamentary Trust [ ] When necessary [ ] Must sell  
[ ] Investment preferences of the sale proceeds *(if the property is sold and testamentary trust continues)*  
[ ] Fixed deposit [ ] Discretion of trustee  
[ ] Others: \_\_\_\_\_

7) IF THE EXECUTOR IS NOT THE TRUSTEE, THE TRUSTEE WILL BE: Every 2 trustees is 1@

Full name	NRIC/Passport No	Relationship	Address

8) WHO WILL BENEFIT WHEN THE TRUST ENDS?

Main Beneficiary(ies)	Share	Main Beneficiary(ies)	Share

Death of a Main Beneficiary, who gets his/her share?

- [ ] To the surviving main beneficiaries in equal shares (default clause) [ ] To the surviving main beneficiaries in proportion to their own shares
- [ ] To the beneficiary's own children equally [ ] To the beneficiaries listed below as Substitute Beneficiary(ies) No. 1

Name of Substitute Beneficiary(ies) No. 1	Share	Name of Substitute Beneficiary(ies) No. 1	Share

Death of a Substitute Beneficiary No. 1, who gets his/her share?

- [ ] To the surviving substitute beneficiaries in equal shares (default clause) [ ] To the surviving substitute beneficiaries in proportion to their own shares
- [ ] To the beneficiary's own children equally 1@ [ ] To the beneficiaries listed below as Substitute Beneficiary(ies) No. 2 1@

Name of Substitute Beneficiary(ies) No. 2	Share	Name of Substitute Beneficiary(ies) No. 2	Share

Death of a Substitute Beneficiary No. 2, who gets his/her share?

- [ ] To the surviving substitute beneficiaries in equal shares (default clause) [ ] To the surviving substitute beneficiaries in proportion to their own shares
- [ ] To the beneficiary's own children equally 1@



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

Additional instructions

Each instruction is 1@

## SECTION 14: PAYMENT TO BE MADE (COMPULSORY)

### MALAYSIA WILL

- 1) Estimated Will writing fee RM \_\_\_\_\_
- 2) Deposit paid (minimum RM480 or amount stated in LOE) RM \_\_\_\_\_
- 3) Will rewriting discount \_\_\_\_\_ % Promotion \_\_\_\_\_
- 4) Will custody [ ] Annually (RM130 each year from the 2<sup>nd</sup> year onwards)  
[ ] Lifetime (RM1,188) [ ] Lifetime Plus (RM1,688)
- 5) RWT Executor appointment fee [ ] RM120 *(Please fill up RWT Executor Appointment Form)*
- 6) Prepaid Gold [ ] RM2,000 *(Please fill up RWT Executor Appointment Form and Prepaid Gold/Silver)*  
Prepaid Silver [ ] RM1,200

### SINGAPORE WILL

- 1) Estimated Will writing fee (3 times Malaysia Will Fee) RM \_\_\_\_\_
- 2) Deposit paid (minimum RM1,440 or amount stated in LOE) RM \_\_\_\_\_
- 3) Will rewriting discount \_\_\_\_\_ %
- 4) Will custody [ ] Lifetime (RM594) *(with Malaysia Will & Lifetime or Lifetime Plus Custody)*  
in Malaysia [ ] Lifetime (RM1,188) *(if no Malaysia Will or Annual Custody for Malaysia Will)*
- 5) Precepts Trustee Ltd Executor appointment fee [ ] RM300 *(Please fill up Precepts Trustee Ltd Executor Appointment Form)*

### PAYMENT MADE BY (FOR MALAYSIA WILL / SINGAPORE WILL):

- [ ] Online credit/debit card payments –  
*(Please email the acknowledgement of payment to [e-service@rockwills.com](mailto:e-service@rockwills.com))*



- [ ] Bank deposit/transfer details: **Public Bank 3139185835 or CIMB 800-2325-790**  
Account name: ROCKWILLS CORPORATION SDN BHD *(Please provide proof of transfer/deposit)*
- [ ] Cheque – payable to **ROCKWILLS CORPORATION SDN BHD**

Cheque No: \_\_\_\_\_ Bank & Branch: \_\_\_\_\_

(Note: Rockwills Corporation Sdn Bhd is the collection agent for companies in the Rockwills Group and for the Singapore Will, and Precepts Trustee Ltd executor appointment fee)



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

## SECTION 15: DECLARATION BY THE TESTATOR (COMPULSORY)

I, being the client and testator, hereby agree and declare that, to the best of my knowledge and belief:

- a) All the particulars and information, including my personal details and identification numbers, furnished by me in this Rockwills Will Instruction Form for the preparation of my Will is, having made all reasonable enquiries, true, complete and correct. I will immediately advise the Rockwills Estate Planner (REP) in writing if any information contained in this Will Instruction Form ceases to be accurate or changes in any way. I acknowledge and confirm that Rockwills Trustee Berhad and Rockwills Corporation Sdn Bhd (collectively "Company") and the REP shall be entitled to rely on my declaration above on the identity(ies) and also all information relating to the preparation of my Will. In the event the Company requires additional information and/or documentation (such as utility bill, copies of Passport and NRIC, income tax returns, salary slip and any proof of income) for preparation of my Will and/or for due diligence purposes, I agree to provide such information and/or documentation required.
- b) I agree to sign the Letter of Engagement (LOE) provided by the REP separately and the terms and conditions stated therein.

### PERSONAL DATA PROTECTION STATEMENT

Rockwills Group values all personal information provided by you and we respect the privacy of your personal information. Any personal information provided by you to Rockwills Group will be solely for providing you with services which you have engaged us to provide and to advise you of other related services products, which may be of interest to you. For details of the Rockwills PDPA, please visit our website at [www.rockwills.com](http://www.rockwills.com)

I have read, understood and confirm the information above and confirmed that the current fees of the Company.

\_\_\_\_\_  
Signature of the Testator

I, the REP named below have verified and sighted the original NRIC/Passport of the testator

Full name: \_\_\_\_\_

\_\_\_\_\_  
Signature of the REP

NRIC/Passport No: \_\_\_\_\_

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

Date: \_\_\_\_\_

Date: \_\_\_\_\_

# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

## SECTION 16: FEES CHARGEABLE BY ROCKWILLS

1)	TYPE OF WILL	NO. OF @	FEE (RM)	2) WILL REWRITE FEE
	Basic	9 & below	480	<b>Normal Will Rewrite Fee:</b>
	Intermediate I	10-12	600	30 clauses or below
	Intermediate II	13-15	750	
	Comprehensive I	16-18	900	Above 30 clauses
	Comprehensive II	19-21	1,100	50% discount* of Will writing fees
	Comprehensive III	22-24	1,300	
	Exclusive I	25-27	1,600	
	Exclusive II	28-30	1,900	<b>Special Will Rewrite Fee:</b>
	Exclusive III	Above 30	2,200-25,000	
	<b>Note:</b>			Not more than 5 changes
	<ul style="list-style-type: none"> <li>Singapore Will writing fees: 3 times the fees stated above</li> <li>Singapore Will rewrite fee: 3 times the fees stated above less 20% discount</li> <li>For Will rewrite discount: if the Will was retrieved or there are outstanding payments, Will rewrite discount shall not be given.</li> </ul>			RM480 if existing Will is not kept at Rockwills  <b>Note:</b> <ul style="list-style-type: none"> <li>Changes are based on existing Will and includes deleting, additions and amendments</li> <li>Copy of the existing Will must be submitted to Rockwills</li> </ul>
	* for clients with Exclusive Lifetime Custody (ELC) or Premier Lifetime Custody (PLC), rewrite Will discount will follow the terms stated for ELC/PLC.			
<b>3)</b>	<b>ANNUAL ESTATE ADMINISTRATION FEES (IF ROCKWILLS TRUSTEE BERHAD IS THE EXECUTOR AND TRUSTEE)</b>			
a)	<b>ESTATE ADMINISTRATION</b>			
	For the first RM1,000,000	1.5% subject to a minimum of RM5,000		
	For the next RM9,000,000	0.9%		
	For the next RM20,000,000	0.5%		
	Amount in excess of RM30,000,000	0.25%		
b)	<b>ANNUAL TRUSTEE ADMINISTRATION FEE FOR TESTAMENTARY TRUST</b>			
	<b>i) MOVABLE ASSETS (such as monies, investments, company shares, jewellery, digital assets)</b>			
	For the first RM1,000,000	0.75% subject to a minimum of RM2,000		
	For the next RM9,000,000	0.5%		
	Above RM10,000,000	0.25%		
	<b>ii) IMMOVABLE ASSETS</b>			
	Without income bearing/rental	RM2,000 per title/lot		
	With income bearing/rental	1% of property value or RM6,000 per title/lot, whichever lower		
	Rental income (if any)	Charged under Movable Assets under (i)		
<b>4)</b>	<b>PREPAID BENEFITS (FOR MALAYSIA WILL)</b>			
	<b>FEATURES</b>	<b>PREPAID GOLD (RM2,000)</b>	<b>PREPAID SILVER (RM1,200)</b>	
	<b>Executor Appointment Fee</b>	Waived when RWT is appointed as the sole executor or first substitute executor (provided Prepaid is subscribed within 90 days from the date of the Will)		
	<b>Discount rate for Annual Estate Administration</b>	<ul style="list-style-type: none"> <li>15% discount when the Gross Estate Value is from RM500,000 to RM10 million; or</li> <li>20% discount when the Gross Estate Value is above RM10 million to RM50 million; or</li> <li>30% discount when the Gross Estate Value is above RM50 million</li> </ul>		
	<b>Additional RM2,000 discount on 1<sup>st</sup> Year Estate Administration Fee, subject to minimum of RM10,000 Estate Administration fee</b>	Yes	-	
	<b>Period of Fixed Estate Administration Rates</b>	Perpetual		
	<b>Enjoy lowest Estate Administration Fee at date of signing up against the date of death</b>	Yes		
	<b>Discount rate for Annual Trust Administration Fees subject to a min of RM1,600 (inclusive of testamentary trusts)</b>	20%	15%	
	<b>Enjoy discount on Trust set up fees</b>	10%	-	
	<b>Period of Fixed Annual Trust Administration Rates</b>	-		
	<b>Transferable</b>	Yes, chargeable with a RM100 transfer fee		



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Aug2021)

Email this completed form and required documents to: [wwif@rockwills.com](mailto:wwif@rockwills.com)

To: **Rockwills Trustee Berhad (200501026798)**  
Wisma Rockwills, No. 62, Jalan 2/131A  
Off Jalan Klang Lama, 58200 Kuala Lumpur

**RE: LETTER OF ENGAGEMENT (“LOE”)**

I, the undersigned, hereby agree to the following:

- 1) Appointment of the authorised Rockwills Estate Planner (“REP”) named below to facilitate the preparation by Rockwills Trustee Berhad (Company No. 200501026798 (708932-T)) (“Rockwills”) of the document(s) below:

Name of REP: \_\_\_\_\_

Document(s) to prepare:  Will  Buy-Sell Trust (each shareholder/partner is to sign a separate LOE)  
(please tick relevant)  Trust

- 2) Terms of engagement:

**Will/Trust**

- (a) Subject to the terms below, to pay Rockwills a non-refundable deposit of RM \_\_\_\_\_ (“Deposit”) upon signing this LOE and the REP taking my instructions;
- (b) Rockwills Corporation Sdn Bhd (“RWC”) shall be the collection agent for Rockwills;
- (c) To pay Rockwills the balance of the Will writing/Trust setup fee upon signing the Will/Trust;
- (d) The Will writing/Trust preparation services shall include a maximum of three (3) revisions to the draft prepared and presented to me by the REP;
- (e) Where the Will writing/Trust preparation services exceed the maximum of three (3) revisions of the draft, it may be subject to additional fees;
- (f) Where the draft Will/Trust has been presented to me and I have not finalized within ninety (90) days, I agree clause (g) below shall apply;
- (g) In the event I cancel the Will/Trust services after the draft has been prepared, I agree that the Deposit to be forfeited. In addition, if the full Will writing fee / Trust setup fee exceeds the Deposit, I agree to pay a cancellation fee amounting to 75% of the balance of the Will writing fee/Trust setup fee;

**Buy-Sell Trust**

- (a) To pay the non-refundable full amount of RM \_\_\_\_\_ (“Full Payment”) being the Buy-Sell Trust fee upon the REP taking my instructions and Rockwills Corporation Sdn Bhd is the collection agent for Rockwills;
- (b) The Buy-Sell Trust preparation shall include a maximum of three (3) revisions to the draft prepared and delivered to me by the REP;
- (c) Where the Buy-Sell Trust preparation exceeded the maximum three (3) revisions of the draft, it shall be subject to additional fees; and
- (d) In the event I wish to cancel the Buy-Sell Trust preparation with the agreement of my business partners and terminate this LOE, I will immediately notify the REP in writing of my intentions to do so and the non-refundable full payment made shall be forfeited.

In the event I am requesting for a change of REP to prepare the above-mentioned document(s) other than the one named in this LOE, I agree that the Deposit/Full Payment shall be forfeited and I agree to execute a new LOE and pay for another Deposit/Full Payment to engage another REP.

I agree that the particulars and information furnished by me to Rockwills are true, complete and correct and Rockwills shall rely on the particulars and information provided by me to prepare the necessary documents and Rockwills shall not be required to seek confirmation of the accuracy of the particulars and information provided by me. I agree that Rockwills and the REP have done their best to ensure the relevant documents being prepared for me reflect my objectives and wishes, and there shall be no warranty given by Rockwills and the REP for the applicability or completeness of advice and recommendations. Where there is any error or omission, I agree that liability shall be limited to the fees paid by me to Rockwills for preparation of the documents mentioned above. I understand and agree that the services provided to me from Rockwills are made in good faith. I shall indemnify and not hold Rockwills and the REP liable for any losses, damages or claims resulting from incorrect or non-implementation, non-compliance, or delays in implementation of the engaged services above.

I understand that all personal information provided to Rockwills and its related companies within the Rockwills Group of Companies will be kept and used only by Rockwills Group of Companies for the purpose of providing comprehensive estate planning services and/or to communicate with me as part of their commitment to provide good customer service to all their clients. I acknowledge my right to my personal information is protected under the Personal Data Protection Act 2010, including my right to request access to or correction of my personal information held by Rockwills. Details of Rockwills’ personal data protection policies can be accessed from Rockwills’ website at [www.rockwills.com](http://www.rockwills.com).

*I have read, understood and agree to the above statement.*

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

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

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

\_\_\_\_\_

NRIC/Passport No: \_\_\_\_\_

*Note: Please request a copy of this LOE for your own records.*