



# ROCKWILLS WILL WRITING INSTRUCTION FORM

Private and Confidential (ver. Dec2021)

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.*