

**INSTRUCTIONS RECOMMENDED FOR EFFECTIVE MANAGEMENT OF AFFAIRS****IF I WERE TO DIE SUDDENLY**

NAME	PLACE
ADDRESS	DATE
CONTACT NO	LAST UPDATED ON
EMAIL I.D.	

Sl No	Subject matter	Issue Involved	Remarks	Annexure
1.	WILL	I have got my will registered	Document no and date of registration	I
		I have not made any will		
2.	ASSETS			
a.	Immovable	Residential house at... (Location)	Door No.; purchase document no.	II
		Vacant land at .....(Location)	Purchase document no.	II
		Let out property at .... (Location)	Door No.; purchase document no.	II
			Details of tenants	
b.	Movables	Fixed deposits, shares and securities, SB account, Vehicles, LIC polices Pension details , Bank Locker etc	Please see details in Annexure III(Nomination is important)	III

c.	Liabilities	Bank loans, housing loan, private loans	Please see details in Annexure IV	<b>IV</b>
3.	Family Members	Spouse, children, grand children	Give name and age of the members as on the date of preparing this note	<b>V</b>
4.	PROFESSIONALS REFERRED	Family doctor/ specialist lawyer/ auditor/ family priest	Give name and contact number	<b>VI</b>
5.	CLOSE FRIENDS AND RELATIVES		Give List with address and phone numbers	<b>VII</b>
6.	SAFE CUSTODY OF DOCUMENTS Location of locker , place of keeping valuables, financial instruments FDs shares etc, personal IT records LIC policies	Locker no and bank, location of the locker/ almirah in the house and the place where the keys are kept usually to be indicated	Please take out a schedule of description to serve as a guide for the persons after demise	<b>VIII</b>
7.	RELIGION/WORSHIP	places of worship	Give the name of temples/ church which are being frequented periodically or is there any pilgrimage centers visited or any vow/wish which are not fulfilled	<b>IX</b>
8.	ATHEIST	give details of the funeral/ rituals you wish your successors to follow	Give details of your assets given to others or other assets in your possession	<b>IX</b>

9.	CONFIDENTIAL	Any other Private lending or borrowing without any legally enforceable record. Have you made any promise of support/cash award/ donation to any-one not covered in the will	Give the name of I. Relatives, II. Staff, III. Servants and the amount you may wish to be paid. Give details of persons from whom there is dealing	<b>X</b>
10.	ASSETS IN OTHERS' CUSTODY		Give details of your assets given to others or other assets in your possessions	<b>X</b>
11.	WISH NOT COVERED IN THE WILL	How to dispose off the body	give details for reference	
		whether eyes/ liver/ kidneys are donated	Give details of documents / declarations signed and their custody	<b>XI</b>
12.	OBITUARY	How you wish to publicize after demise	Which paper, which photo, what contents, Details of the order in which obsequies to be conducted.	<b>XII</b>
13.	ANY COURT CASE	What is it about	How to continue Any other information like Advocate in custody of records	<b>XIII</b>
14.	ANY UNFINISHED PROJECTS/PROGRAMME	Is there any Building/ House /Marriage of children pending	What you wish to state	

15.	ANY CHILDREN WITH PHYSICAL OR MENTAL DISABILITY	Names	What provision or security you wish to provide them	
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DATE	SIGNATURE
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**Note** – Just as will is done and reviewed/ remade, the above data can be periodically reviewed and redone. When the details and data is captured in the computer, updation becomes a simple exercise. A closed cover noted as confidential stating name and date could be kept along with will or given to a close relative or a friend after briefing the need for such requirements with a note.