

## WILL DETAILS FORM

---

Your client is giving you his/her instructions and wants the Will to be drafted. Using the Will Details Form (WDF) given, insert the instructions given into the correct column/spaces provided, with the correct descriptions of assets, to reflect the wishes of the client, to be submitted to OSK Trustees Bhd for drafting.

### The Instructions

Client's Name	Yong Guai Low (Male) (NRIC No. 600112-13-6655)(50 years old) No.2311, Jalan Setapak 2/3, Taman Setapak, 53100 Setapak, Kuala Lumpur , Wilayah Persekutuan
Religion	Christian
HP No	016 – 2424 244
Office No	03 – 4343 3344

Yong Guai Low, a Managing Director of Semicon Company, has been married for 24 years to Teoh Chin Na, 44 years old (NRIC No. 660209-13-5566), an Accountant. Guai Low is currently undergoing chemotherapy for lung cancer. He has written his will in Malaysia in the year 2000 and now wants to rewrite his will.

Guai Low has the following dependents:

- a) Yong Mei Mei (NRIC No. 830910-13-2344) (daughter) – 27 years old (child from previous marriage)
- b) Yong Mun Mun (NRIC No. 010113-13-6684) (daughter) – 9 years old
- c) Yong Kin (NRIC No. 861212-13-4567) (legally adopted son) – 24 years old
- d) Yong Long (Birth Certificate No.K303123) (son) – 3 years old
- e) Yong Ah Su (NRIC No. 301211-13-1315) (Father) – 80 years old
- f) Chan Mei Ling (NRIC No. 350403-13-2340) (Mother) – 75 years old

Guai Low has the following instructions:

- 1) Guai Low wants his wife to represent him when he is no longer around. If his wife predeceases him or is unable to carry out the duties, he wants his daughter, Mei Mei to be the substitute. In the event that no one is able to be his executor, he wants OSK Trustees Bhd to be the executor for his will.

- 2) His sister, Yong Leng Leng (NRIC No. 551020-13-2424) of A-13-15 Alpha Condo, Setapak Garden, 53000 Setapak, Kuala Lumpur, who is a nurse has agreed to look after the children in the event he and his wife is no longer around to take care of them. Leng Leng is to be paid RM5, 000 monthly as an allowance for looking after the children. This money is to be paid out from the insurance policy with Allianz Insurance Bhd which has no nomination. (Policy No. 748748) and the payment to her to cease when the youngest child reaches the age of 21.
- 3) Specific gifts:
- He wants Chin Na to inherit the house at No.2311, Jalan Setapak 2/3, Taman Setapak, 53100 Setapak, Kuala Lumpur, Wilayah Persekutuan, Malaysia which they are currently residing and if she predeceases him, to all the children equally (except Kin). The house was bought jointly with Chin Na when they got married 22 years ago;
  - He wants to give his condominium at B-23-11 Genting View Condominium, 53100 Setapak, Kuala Lumpur, Wilayah Persekutuan, Malaysia to his wife absolutely. If she predeceases him, then to all his children in equal shares;
  - He wants to give his land at HS(M)2311, Lot No. 1231, Mukim Balah, District of Cheras , Selangor Darul Ehsan, Malaysia to his children in equal shares;
  - 10% of the monies in all his personal bank accounts to be given to Kin. The balance will be shared equally by the other 3 children.
  - All his joint bank accounts to be given to the person(s) holding the account jointly with him.
  - All Unit Trust to his wife absolutely;
  - All his shares under CDS Acc No. 32436 02312 88888 with OSK Investment Bank Berhad to Kin & Long in equal shares;

- All the contents in safe deposit box no. 3883 of UOB Bank Berhad, Jalan Manis, 50000 Kuala Lumpur to Yong Kin 100% and if he predeceases him then to be given Yong Long.
  - Cars to be sold and the proceeds thereof to be given to Mei Mei and Mun Mun in equal shares;
  - Antique collection to Antique Fans Collection Association, Woodlands Tower 56<sup>th</sup> Floor, #256490 Singapore;
  - Shares in MY.com Sdn. Bhd. (Co. No. 928219-K) to his wife absolutely, but if she predeceases him, to all his sons equally. If any of his sons passes away, the deceased share is to be given to his sister, Yong Leng Leng (NRIC No. 551020-13-2424) absolutely;
  - He intends to give his Employment Provident Fund (EPF No. 11223344) to Yong Long in the event the nomination fails or no nomination is made or in any situation the funds form part of the estate;
- 4) He intends to set aside his Life insurance policy (Policy No. 8811088) with Good Western Insurance which is not nominated to Yong Long and Mun Mun but subject to a testamentary trust for their education, health and maintenance expenses where the trustee would disburse a monthly payment of RM5,000 equally to them until the youngest reaches the age of 21 years. If there is any balance when the youngest reaches the age of 21, it would be given to them equally.

However, if on the day of his death Yong Long and Mun Mun have reached 21 years old, they are to be paid the whole lump sum equally. If both of them predecease him then the proceeds will be paid to Yong Kin.

- 5) He intends to set aside his Life insurance policy (Policy No. 423310) with Excel Eastern Insurance which is not nominated to his parents equally but subject to testamentary trust for their health and maintenance expenses where the trustee would disburse the proceeds at their discretion until the parents' demise. If both of his parents do not survive during the duration of the trust, he wants the proceeds to be paid to Yong Long.

However, if both of his parents predecease him, the proceeds to be paid to Yong Long.

- 6) He wants all his residuary estate to be given to his wife and if she predeceases him then to give to his children in equal shares.
- 7) Guai Low wants his executor to insure all his assets against fire and other losses. He also wants his beneficiaries to be allowed to reside in the house(s).
- 8) He has a wish that when both, he and his wife are not around, his good friend, Rock Wai Ler (NRIC No. 441021-13-5151) can adopt his dog, Jack Russell, which answers to the name of Chu Chu. If his friend is unwilling, he would like to request his adopted son, Yong Kin, to put up an advertisement for Chu Chu's adoption by the public.
- 9) Guai Low is not in good terms with his in-laws and therefore worries that his wife's siblings will get a share in his wealth if his wife passes away soon after him. He requested a 60 days condition for his beneficiary to survive after him in order to receive his inheritance.
- 10) Guai Low is also wondering who he should entrust his final will to for safekeeping as the place where he is staying now is prone to floods.