

CARDINALSTONE TRUSTEES LIMITED
5 Okotie Eboh Street, Ikoyi, Lagos, Nigeria
+234 (1) 631 2225 | +234 (1) 710 0433

INSTRUCTIONS FORM FOR DRAWING UP WILLS

1. Testator's Full Name:

2. Residential Address and such former addresses as may be necessary for identification purposes in the Will
.....

3. Office Address for purpose of communication only
.....

4. Telephone Numbers:

5. Proposed Executors:
 - i. Full Name: CardinalStone Trustees Limited

Address: 5 Okotie Eboh Street, Ikoyi, Lagos, Nigeria

Occupation: Executors

 - ii. Full Name:

Address:

Occupation:

6. Appointment of Trustees (where applicable for Testamentary Trust)
 - i. Full Name: CardinalStone Trustees Limited
Address: 5 Okotie Eboh Street, Ikoyi, Lagos, Nigeria
Occupation: Trustees

Strictly Confidential

7. Directions as to Burial/Cremation:
.....
.....
.....
.....

8. Any other special instructions regarding disposal of the body, tombstone
.....
.....
.....

9. Particulars of interest in landed property owned (state brief description and whether freehold, leasehold, or subject to Certificate of Occupancy)

i.

ii.

iii.

iv.

v.

vi.

Where are the Deeds?

.....
.....

10. Is the Land Mortgaged? Yes/No

11. Details of Property owned

i.

ii.

- iii.
- iv.
- v.
- vi.
- vii.
- viii.
- ix.
- x.

12. Specific Gifts

I give

.....

.....

.....

.....

.....

13. RSA & Bank Details

PFA:.....

RSA Number:.....

Name:

14. Instructions Regarding Residue

.....
.....
.....
.....

15. Provision of an Investment Clause:

.....
.....
.....

16. If any dependant is not a Beneficiary, the reason for this?

.....
.....
.....
.....
.....

17. Is there a disinheritance of any person?

.....
.....
.....

18. Provision of yearly payment to certain persons

.....
.....
.....

19. Where is the Will to be signed and lodged?

.....
.....
.....

20. Proposals for custody of Will and made-up copies?

.....
.....
.....

21. Details of Next of Kin

Name:.....

Phone Number:.....

Email Address:.....

Residential Address:.....

Official Address:.....

Occupation:.....

22. Witnesses:

Name:.....

Phone Number:.....

Email Address:.....

Residential Address:.....

Official Address:.....

Occupation:.....

Name :.....

Phone Number:.....

Email Address:.....

Residential Address:.....

Official Address:.....

Occupation:.....

23. Any Other Directions?

- a.
- b.
- c.
- d.
- e.

NOTES

1. An **EXECUTOR** is a person appointed to carry out the provisions of a Will in effect.
2. A **DEVICEE** is a gift of land or other realty by Will to the beneficiary or to trustees for sale.
3. A **LEGACY** is a gift personal property by Will. A Specific **LEGACY** is a **BEQUEST** of a specific part of the personal estate.
4. A **BEQUEST** is a gift or property given to a Legatee.
5. The **RESIDUE** is all the remaining property including any gift, which fails. This could be vested in the Trustees for sale, the proceeds of which is to be applied as directed such as for payment of debts, funeral expenses e.t.c.
6. An Investment Clause gives power to the Trustees to invest proceeds of sale in approved securities.

SCHEDULE ONE

BENEFICIARIES CREATED HEREIN

Names of Ultimate Beneficiaries	Date of Birth	Bequeath and Percentage of distribution.

SCHEDULE OF ASSETS (print this page in duplicate if assets are more than columns provided)

S/NO	DESCRIPTION OF ASSET	NATURE OF TITLE	VALUE	LOCATION	REMARK

SIGNATURE AND DATE