

It's been a year since our last Annual Letter and we hope you have been well.

As a client of Professional Wills, we write to you each year as a reminder to take a moment to consider if there have been any events in your life in the past year which would require an update to your Will.

We have created this checklist as a starting point, but of course, it's not exhaustive:

- Divorce, marriage, separation involving yourself - or any of your beneficiaries
- Death of an Executor, Guardian or Beneficiary
- Birth of a Child or Grandchild
- Change to your country of residence/domicile
- Purchase of property, or other assets in a country where you do not currently have a Will
- New life insurance policies, pensions or investments
- Opening of a new business and considering the business succession plan
- New specific gifts to add to or delete from your Will
- If it has been a while since you reviewed your Wills and needed a refresh on your distributions

Professional Wills and Partner Services

All aspects of Will writing, estate planning, succession planning, and tax are intimately linked.

This is particularly important when it comes to repatriation planning and wealth management. If you are planning to move, then come for a free consultation to learn more.

Tax Considerations

Through our collaborations, we have tax advisors who can assist you with advice on a range of countries.

Legal Services

We work closely with legal experts to provide guidance on a wide range of areas.

Living Wills / Advanced Medical Directives (AMD) (if applicable)

We will send the annual signing form for you to return to us to store with your AMD. We recommend that you confirm your choices annually to bring more assertiveness to your AMD. Please either mail or scan the form to us.

Enduring Power of Attorney (EPA) (if applicable)

This serves as a reminder to inform your attorney that we are storing your EPA and how to contact us should it be required. Do not forget to forward the attached form to your attorney.

Wills Storage

We encourage all our clients to keep their Wills independently stored in our fireproof safes. The benefits of storing your Wills with us include:

- The peace of mind knowing your original Wills, EPAs and/or AMDs are safely stored and will only be released to the Executors upon proof of identification
- we answer any questions you might have with your Wills, EPAs, or AMDs via telephone/email/Zoom or general changes to your estate planning - free of charge!
- we offer 50% off for any updates to existing Wills (written by PWL) that you may require.