**Basic Will (Non-Muslim)**

* Make Step 3 New Step 4
* Make Step 4 New Step 3
* We might need a step for Asset Listing and just select from the list during Distribution Step 7

Step 1

* If answer is Yes to Are you writing the Will on behalf of something else, there is a need to have a page for the details of the person completing the form. This should be the same as Step 2 Personal Details

New Step 3

* Remove “Do you want to add alternate executor?”
* Excecutor Remuneration field should NOT show if the answer is No to Will the Executor be Remunerated
* If “Will the executor be remunerated?” Is Yes , create Remuneration field for each Executor entered

New Step 4

* Change Wives to Husbands/Wives/Spouses. This should be done anywhere we have Wife
* Make Address multistep

Step 5

* Add DOB field for Children (maybe two columns in each row)

Step 6

OK

New Step 7 –

* We should make this a step for adding all the assets so that we can select the assets from the dropdown in Step 7 – Distribution instead of adding them in Step 7
* Add “Location” and “Upload fields” to the fields already showing for each Asset Type on Step 7
* Every asset added should also create a document list like adding document against a will normally. Anything attached at this stage should be in the attachment of Add Document. If nothing is attached at the step, it can be attached at the Add Document

Step 7

* There will be Select Asset created at New Step 7
* Add “Charity” to options of Beneficiaries in Step 7 and Step 10
* I think we should be able to select multiple beneficiaries for each asset

NOT SURE WHAT SHOULD BE STEP 8 & 9 (BOTH MISSING)

Step 10

* If “Distribute equally to field” is used. “Leave to Specific Individual” field should GREY OUT.
* If “Leave to Specific Individual” is selected, “Distribute Equally” should GREY OUT
* We need to add fields for adding the “Name”, “Address” and “Percentage to Distribute” if Specific Individual is selected.
* We need to include “Add Button” to add more “Name”, “Address” and “Percentage to Distribute”.
* THE PERCENTAGE WHEN “Leave to Specific Individual” is selected should ADD UP to 100%

Step 12

* Remove other fields if any gift to Pet is No

**Basic Will (Muslim)**

* We might need a step for Asset Listing and just select from the list during distribution step

Step 1

* If answer is Yes to Are you writing the Will on behalf of something else, there is a need to have a page for the details of the person completing

Step 2

* If Married and a Woman/Female, Wife becomes Husbands/Spouse in Step 4 and Step 7
* Address should be multistep

Step 3

* Call Step 3 Wives and Family Members for Wasiyah
* Instruction should be somewhere above Wives
* Change Wives to Husbands/Wives/Spouses. This should be done anywhere we have Wife
* Make Address multistep
* Schedule A should be clickable and open the PDF of the schedule

Step 4

* Children need DOB field

Step 5

* Address should be multistep
* We should remove Other from the list of option for relationship

Step 6

OKAY

New Step 7 – Asset Listing.

This should work the same as New Step 7 in Non-Muslim

Step 7 – New Step 8

* When Step 7 (New Step 8) is No, it should move to Burial Arrangement section

If Step 7 (New Step 8) is Yes, it should be the same as New Step 3 in Non-Muslim. Make the following changes as New Step 3 in Non-Muslim

* Remove “Do you want to add alternate executor?”
* Excecutor Remuneration field should NOT show if the answer is No to Will the Executor be Remunerated
* If “Will the executor be remunerated?” Is Yes , create Remuneration field for each Executor entered

Step 8

* Instructions that only ONE-THIRD of the total asset can be distributed for Charitable Giving and Distributions should be at the top of the page
* It will only be Sister, Family, Friends , Pet, and Others
* Others should have a field to enter what other means
* Is there a chance to give many people one gift. Add “Add More” Beneficiaries option for a gift might be an option
* Add Asset Listing drop down from New Step 7 instead of Asset Type, Description and Amount

Step 12 (Lets Discuss if you wish)

Maybe turn step 12 to Pet Cartakers if we move Pet Gifts to Step 8

**Deed of Gift**

Step 3

* When Other is selected in the Relationship, a new text field should show

Step 4

* Add “Document Location” and “Upload File” fields to each Asset Type fields

I think we should be able to Add more than one Gifts to a gift

* Add Investment to the list of Type of Gift
* Change Personal Property to Personal Possession
* Any Asset added in this step 4 should create as “Document” is a new document that works the same as Will Document functionalities.   
  (NOTES  
  1. Gift Is added as asset

2. Document Name = “Type” + “First five characters of the description”

)

Step 6

* Agent Address should be multi-field
* Alternate Agent Address must be multi-fields

**Living Trust**

Step 3

* Lets discuss this step flow. It does not seem to be right with the question “Is the Grantor not the Trustee”

( NOTES  
1. Text Change “Is the Grantor the trustee”

2. inverse the fields (yes no)

3. Confirmation check box only appears for the company

“Confirm that the right to act as a trustee has been written in the article ofr association. Then, Name and Address, Role “  
)

Step 4

* Change Personal Property to Personal Possession
* Add “Document Location” and “Upload File” fields to each Asset Type fields
* Each gift should create Document for the gift. Same functionality as the Will

Step 5

* Each Beneficiary should have DOB

New Step 6

Specific Gift is missing. It should be:

* Dropdown of “Beneficiaries” from Step 5 WITH “Add button” to add more beneficiaries per gift.
* Dropdown of Assets from Step 4 WITH “Add button” to add more gifts for the beneficiary
* “Add More” button for adding more gift against beneficiaries”

Step 6

Gift for Charity should be a drop down from the gifts added in Step 4. Gift already selected in New Step 6 cannot be selected for Charity

Step 7

Subtrust should have address field as multifields