**CHANGES RELATING TO ADDING MUSLIM WILL TO CREATE WILL AND ADDING DEED OF GIFT AND LIVING TRUST AS PRODUCTS**

**1 - Home page Addition**

1. Living Trust (Multi Step and PDF Output) – Pricing on the price page as well. Also, part of Individual Users use case. Major requirements will form fields and the PDF designs
2. Deed of Gift (Multi Step and PDF Output) – Pricing on the price page as well. Also, part of Individual Users use case. Deed of Gift will appear for each row of created will and will have many to one relationship to a will. Major requirements will form fields and the PDF designs

**2 - Will Creation Changes Multi Step Form**

Change is to introduce Muslim Will as part of Will creation.

* **Step 1**

Add “Are you a Muslim?”

If Yes, Ask “Would you like to create the Will in accordance to Muslim Will (Wassiyah)”

* **Step 3 (Add to instructions only)**

“Add family members and your relationship with them. Family members must include Wife/Husband, Sons, Daughters, Sister, Brothers, Grand Father, Grand Mother, Uncles that is entitled to your estate according to Islamic law. Please note Will be shared to your family according to Islamic right. Please click the “Schedule A” to understand Islamic sharing formula.”

* **Make Step 5 new Step 4**
* **Crate New Step 5 for Other Family Members**

This should include Name, Address and Relationship of the family member. Relationship can be any of Sister, Brothers, Grand Father, Grand Mother, Uncles

**Make this Step 7. Start by asking the question below**

Do you wish to leave gift for someone outside your family (Please note that maximum one-third of the total value of the estate can be shared outside of the Islamic law. Any Will now follow up normal Will probate process)

**If yes, upload form on Step 4 on the page**

* **Make Step 7 Step 8**

Change the heading to “Charitable Giving and Distribution”

* **Step 10**

Not needed for a Muslim Will type

* **New Step for Muslim Will Only**

Allocation of Estate (In order of Priority)

Please select of priority of this Will Allocation Group. The priority is defaulted as below but can be changed to suit your order of priority

1. I direct that my executor apply first, the assets of my estate to the payment the expenses associated with my burial, to my medical expenses, to the repayment of my debts, to legal and administrative expenses, including taxes, which are associated with my estate.
2. I direct that my executor allocate and distribute from the residue of my estate, charitable contributions as outlined in Article 8, [Charitable Contributions and Testamentary Transfer].
3. I direct that my executor allocate and distribute from the balance of the residue of my estate, to my legitimate Muslim heirs, as outlined under Article 9, [Distribution of Residue of Estate to Muslim Heirs]

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**3 - This will be part of Document section of the Will as Document Type (Let me get back properly)**

* Assets
* Obligations
* Physical Items that needs to be returned
* Financial Obligation
* Religious Obligation

**4 - Addition to Individual User Use Case**

* **Deed of Gift (Sample Form field links) - The fields for multisteps form and PDF design will be provided later**

**Living Trust Multi-Step Form**

**Step 1**

* Are you over 18
* Are you of sane mind
* Do you own the property to be vested in the trust
* Are you creating a revocable or irrevocable trust

**Step 2 Personal Details**

* Trust Of – Name, Address, Phone, Email

**Step 3 Trustee Details**

* Is the Grantor not the Trustee
* (If Not), Trustee Type (Individual/Organisation)
* (If Organisation), confirm that the right to act as a trustee has been written in the article ofr association. Then, Name and Address, Role
* (If Individua)l, confirm that individual is of sound mind, over 18 and can own a property. Then Name and Address of Trustee
* (If Grantor is the Trustee), Successor Trustee Name and Address
* Do you want Co-Trustee
* (If Yes), Name and Address.
* Would you like to Name the Trust (Our Preference is The [Grantor Name] Living Trust)

**Step 4 Gift and Asset**

* What type of Asset (Real Estate, Financial Account, Stock and Bond Certificate, Business Interest, Contractual Interest, Life Assurance Proceed, Personal Property, Retirement Proceed)
* (If Real Estate), (Address, Type)
* (If Financial Account), (Name, Type of Account, Account Number)
* (If Stock and Bond), (Stock -Name of Issuer, Number of Shares, Certificate Number, Description) (Bond- Name of Issuer, Face Value of Bond, Certificate Number, Description)
* (If Business Interest), (Business Name, Description of Interest)
* (If Contractual Interest), (Title of Contract, Name of Other Party, Date of Contract, Description)
* (If Life Assurance), (Name of Issuer, Description of Policy, Policy Number)
* (If Retirement Proceed), (Name of Issuer, Description of Policy, Policy Number)
* (If Personal Property), (Ask the question “Do you want to place all your personal property in the Trust”. If No, (Description of Property)

**Step 5 Beneficiaries**

* Name of Beneficiaries (Family, Friends, Charity) who will receive the trust property you pass away. Gift can be (1) General -This are percentage of gift left to beneficiaries after any specific and charitable gifts are given) (2) Specific – gifts assigned to a specific or friend) (3) Charitable – Cash gifts or other items given to charities you would like to make
* Name Specific Gift you will like to make from the trust (Give the following Items, To, Alternate Recipient)

**Step 6 Charity**

* Name of Charity you will like to give gift and the gift

**Step 7 Subtrust**

* Do you want to create Subtrust for Beneficiaries that are young or cannot handle the gift ( Name of Person the Gift Should be held in subtrust, Hold Till Age Limit)

**Step 8 Pour Over Will**

* Do You Want Pour- Over Will (Do you want to include Pour-Over Will)

**Step 9 Additional Instruction**

* Any additional instruction for the Trust that you will like to be add for the time you are alive.
* Any additional instruction for the Trust that you will like to add following you demise or the time you are incapacitated

**Step 10 Trustee Remuneration**

* Should the Trustee be renumirated for taking on the trust. If yes, give instruction of renumiration stating the amount for a particular period of say monthly or yearly

**Step 11 Signature and Selfie**

Signature and Selfie

Signatures of Grantor and Trustee and Successor for PDF

Afidavit from Notary Public for PDF – Date, Place and Time

**Deed of Gift Multi-step Form**

**Step 1**

* Country of Gift
* State of Gift
* Do you want to be able to revoke this gift
* Date of Transfer

**Step 2 Donor**

* Type of Donor ( Individual or Company)

(If Individual), Full Name of Donor

Address of Donor

(If Company), Full Name of the Company

Address of Company

**Step 3 Donee**

* Type of Donee (Individual or Company)

(If Individual), Full Name of Donee

Address of Donor

Relationship between Donor and Donee

(If Company), Full Name of the Company

Address of Company

* Is Donee a Minor

(If Yes), Full Name of Legal Guardian

Address of Guardian

**Step 4 Gift**

Type of Gift (Real Property, Personal Property, Monetary Gift)

If Real Estate, Description of Gift

Monetary Value

Purpose and Usage of Gift

When Donee take possession (immediate or on a specific date)

**Step 5 Additional Clause**

Additional Clause (Add another)

**Step 6 Agent Details**

Agent Details that will act on the behalf of the Donor to carry out the transfer

Agent Full Name

Agent Address

Alternate Agent if the First one is not available

**Step 11 Signature and Selfie**

Signature and Selfie