



PLANNING FOR THE FUTURE

Making a will allows you to determine how your assets will be distributed after your death. It can also be a wider opportunity to put your affairs in order and to make things easier for your loved ones or anyone else who may need to assist you with managing your affairs, should you no longer be able to do so.

In order to ensure that your will is comprehensive and effective, we ask you to provide us with the following information:

1. Your full name and identification number and the full names and identification numbers of all the people you wish to mention in your will (Israeli ID numbers or passport numbers as appropriate).
2. Please let us know whether this will is covering only your property in Israel or your assets worldwide. If you have an additional will for other property, this should be referred to in the Israeli will to ensure it is not revoked by the new will.
3. Details of any specific gifts that you wish to make.
4. The details of any house, apartment or other real property that you own including, if you have these, the block and parcel number. If the property in Israel is registered with a passport number, please check that this is the number of your current passport and a certified copy of this should be kept with your will.
5. If you have assets abroad, we advise that you consider whether any inheritance/estate tax planning is required. We can recommend specialists in this area.
6. Please note that insurance policies, Kupot Gemel and some other investments do not form part of your estate and will automatically pass to the beneficiary registered on the policy in the event of your death. You should ensure that the beneficiaries listed on the policy are correct.
7. If you are making a joint will with your spouse, do you wish to allow the surviving partner to alter his or her will after the death of the first partner.
8. If you wish to appoint an executor, we will also need full details of that person and, if possible, you should obtain their consent to the appointment.
Israeli law does not require you to appoint an executor but it may be advisable if none of your beneficiaries are resident in Israel or if you wish to have a professional or other non-family member dealing with your estate.
9. You may also include provisions relating to guardianship of any minor children. These will not be binding on the court but will allow you to express a preference to be taken into account.
10. If you wish to include any specific provisions regarding your funeral or burial, please let us have details.

Enduring power of attorney/living will: Israeli law now allows you to appoint someone to manage your financial affairs and/or to take care of your physical wellbeing when you are no longer competent to do so. If you are interested in receiving more information about this process, please let us know.

Please inform us if there is any physical or cognitive issue we should be aware of so that we can adjust the process accordingly and make arrangements for any extra documents which may need to be prepared.