



CWalsh

## PLANNING FOR THE FUTURE

Making a will is one of the most important steps you can take to ensure your wishes are respected and your loved ones are provided for. A well-drafted will not only determines how your assets are distributed after your death—it also helps reduce stress and confusion for those handling your affairs. Preparing a will is a chance to take stock of your assets, express personal wishes, and ensure that everything is in order, both practically and legally.

To assist us in preparing your will effectively and according to your wishes, we will ask you to provide us with information on the following points:

### 1. Personal Details

Your full name and identification number (Israeli ID or passport), as well as the full names and identification numbers of all individuals you wish to mention in your will.

### 2. Scope of the Will

Will this cover your assets in Israel only or your worldwide estate? If you already have a will for assets in another country, please let us know so we can include appropriate references to avoid accidental revocation.

### 3. Specific Gifts

Details of any specific gifts you wish to make, for example personal belongings, jewellery, family heirlooms, or sums of money to specific individuals.

### 4. Real Estate

Information about any house, apartment, or land you own, including the block and parcel number if available. If your Israeli property is registered under a passport number, please confirm that it reflects your current passport and provide a certified copy for our records.

### 5. Digital Assets

Consider what should happen to your email accounts, social media, photos, cloud storage and other digital information.

### 6. Insurance and Pensions

Life insurance policies, pension schemes, and Kupot Gemel typically pass directly to the named beneficiary/ies and are not part of your estate. You should ensure these beneficiary designations are up to date.

### 7. Charitable Gifts

If you would like to leave a donation to a charity please provide the full name and address of the organisation.

### 8. Inheritance Tax Planning

If you have assets abroad, you may be subject to inheritance or estate taxes in other jurisdictions. We can recommend experienced professionals who specialise in cross-border tax planning where necessary.

### 9. Joint Will

If you are preparing a joint will with your spouse, please let us know whether you would like the surviving spouse to have the right to amend their will after the first partner's death.



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#### 10. Executors

Israeli law does not require you to appoint an executor and we will discuss if you should include provisions for an appointment.

#### 11. Guardianship of Children

If you have minor children, you may use your will to express a preference for who should be appointed as guardian. While this is not binding on the court, it is given serious consideration.

#### 12. Funeral and Burial Wishes

You may include instructions for burial, cremation, religious preferences or other personal wishes. These are not legally binding, but they help guide your family in a difficult time.

#### 13. Reviewing Your Will

We recommend reviewing your will every few years or following any major life changes (marriage, divorce, birth of a child, acquisition of property, etc.) to ensure it remains up to date.

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.