ASSETS CHECKLIST

NO	PARTICULARS	Document required	Beneficiary
1	Immovable Properties - house - factory - shop	Titles Please provide **address**	
2	Household content	Receipts	
3	Valuables	Receipts	
4	Cars	Log book	
5	Savings i. normal saving ii. fixed deposit	Account books etc (What is required is A/c No. No need to reveal the amount)	
6	Stocks and shares i.	Share Certificates/Bursa Malaysia statement/Stock Exchange Account No.	
7	Business eg sole proprietor/partnership /Sdn Bhd	Business Registration Cert/Form 24 & 49 (If partnership or Sdn Bhd Co, it is advisable to have separate Business Continuation Agreement)	
8	Jewellery i. ii.	Bank safe box no. & name of the Bank/Receipts	

NB

i. Life policy

S23 Civil Law Act + S166 Insurance Act, if the insured has nominated the spouse and/or children as beneficiary, a trust will be created. The sum assured no longer forms part of the assured estate. The assured cannot will it away.

ii. EPF

Under EPF regulation, a will cannot revoke an earlier nomination. To revoke, you have to use prescribed form provided by the EPF Board.