

# User Guide on WillHelpU.net

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## Glossary

These are some terms you might encounter when making your last will & testament.

#### Assets

Everything someone owns, including real property, bank accounts, life insurance, investments, jewellery, furniture, retirement accounts, and vehicles.

#### Beneficiary

A person who will receive assets from the estate of the deceased.

#### Bequest

A gift in a will or trust. Gifts are normally specific (a particular item or cash gift) or residuary (a percentage share of what is left after all other gifts have been made). A testator can make a bequest to a specific person, organization, or a class of people (e.g., children, grandchildren.)

#### • Deceased

A person who has died.

#### • Estate

The property and assets of the person who has died.

#### Executor

Is a person appointed by the testator/deceased to be responsible for the management and distribution of assets to the beneficiaries

#### Minor

A person who has not yet reached the legal age of majority ie. 18

#### • Testator/Testatrix

The person making a will (male or female)



#### • Trust

One or more persons holding property for the benefit of others (the beneficiaries). A Trustee is the person who is acting in the trust and holds the property for the benefit of someone else.

#### • Will

A legal document that contains the legal and financial wishes of a person upon his or her death.

#### • Witness

The witness is there to make sure that the testator (person making the will) has the mental capacity required for the will to be legal and valid. The witnesses also sign the will after the testator



### How to Register?

- (a) Click on "Sign Up"
- (b) Fill in all the information required to set up the account.

Important: PLEASE REFRAIN FROM USING YOUR BIRTHDATE OR THE BIRTHDATE OF YOUR LOVED ONES AS THE PASSWORD.

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	Username (Minimum 6 characters) Sample Account
Will telpU	Email (account activation)
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©WillHelpU.net 2021 *	Privacy Policy * * Terms & Conditions *

- (c) Check your email which you used to sign up for this service. A welcome email will be sent to you. Activate your account by clicking "ACTIVATE NOW".
- (d) You will get the below message like this (see below).

Welt+22 ♣ Home & Getting Started	Login Sign Up
Account Activation	
Congratulation, You have activated your account. You may now login to your account.	
Login	



### Let's Get Started

- (a) Click on Log In.
- (b) If your computer is a public computer or shared computer, please **DO NOT** click "**Remember the password**".
- (c) Once you log in, you will see **STEP 1: CREATE A TITLE OF YOUR WILL.** Click on **New** on the right hand side of the screen.

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Step 1: Create a title of your Will						
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- (d) Once you click on "**New**", "**Will Title**" will pop up. You can now name your will. The reason for this is because you can have different version at different stages in life.
- (e) After naming your will, you should press "SAVE".



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### **Complete Personal Information**

- (a) Please fill in your "**Personal Details**" accurately. Use the name as per your National Registration Identity Card (NRIC) or as per your passport. Accuracy of your personal information is very important.
- (b) Once you have completed filling up your "Personal Details", please click on "SAVE & NEXT".



### **Executor's Details**

IMPORTANT: PLEASE FILL IN THE INFORMATION OF 2 OF YOUR CHOSEN EXECUTORS. THIS IS TO ENSURE THAT THE ESTATE IS DISTRIBUTED IN A FAIR AND HONEST MANNER. EITHER EXECUTOR CAN TAKE OVER THE OTHER EXECUTOR'S DUTIES IF HE/SHE DIES, IS UNABLE TO ACT AS AN EXECUTOR, OR DECIDES HE OR SHE DOES NOT WISH TO BE THE EXECUTOR

THE EXECUTOR NEEDS TO BE TRUSTWORTHY, HONEST, ORGANISED AND CARES ABOUT THE WELLBEING OF YOUR FAMILY AND LOVED ONES. SO PLEASE CHOOSE WISELY!

(a) Click "ADD" to fill in the information of your chosen executor.

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Fill in the details of your executor in "Executor Detail" and then click "SAVE". (b)

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- (d) When you have completed filling in the information of the 2<sup>nd</sup> executor, you are required to click "SAVE" to save the information.
- (e) Upon completion, you should have the view below. You may delete or edit the details of your executor/s at any time before finalizing and printing your Will. When you are ready, please click "Next" to move to the new tab, which is Property.

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			©WillHelp	U.net 2021	* Privacy I	Policy * * Terms &	Conditions *					



### Property

NOTE: There is no fixed/set rules as to how you want to distribute your property. You can give it all to 1 beneficiary or you can give it to multiple beneficiaries. You may also choose the percentage for each beneficiary.

IMPORTANT: THERE ARE 2 TIERS TO FILL UP. TIER 1 IS FOR THE BENEFICIARY WHO WILL BENEFIT UPON YOUR DEMISE. TIER 2 WOULD BE THE BENEFICIARY WHO WILL BENEFIT IN THE EVENT TIER 1 BENEFICIARY DIES BEFORE YOU. THIS HELPS YOU FROM HAVING TO REWRITE YOUR WILL.

For example, if the property is given to ABC, and ABC dies before you, ABC's share will be passed on to DEF, the tier 2 beneficiary.

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(a) To start filling up the information of the "**Property**" please click "Add".



(b) Please fill up the details of the Property.

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Property Detail				
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Property Info				
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Beneficiary Proportion				
1 person	~			
Save				
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	©WillHelpU.net 2021 * Privacy Policy * * Terms & Co	onditions *		

(c) Select beneficiary proportion. 1 person means sole beneficiary or more than 1 person (multiple beneficiaries). Once you have selected your option, please click "SAVE".

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Property Address					
Unit 1-1 Changkat Kiara Mont Kiara 5	0000 Kuala Lumpur				
Beneficiary Proportion           1 person           1 person           2 person equal share	~				
Back Next					



(d) Click on "Add Tier 1" after you have filled in the details of your property.

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Step 4: Fill in your asset(s	) info and assign	beneficiar(ies)										
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(e) Please fill in the information of your Tier 1 Beneficiary for the selected property. Fill up the proportion (%) you want to bequeath the beneficiary.

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(c) After adding the details of the Beneficiary, please click "SAVE". If you have more than 1 Beneficiary to the property click "Add Tier 1".

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Note: In the event of the beneficiary	listed above (Tier 1) departs this world	d before you, the property w	ill go to the person li	sted below (Tier 2).		
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2 Betty	190127109876	Niece	60	Edit Delete	Add Tier 2	
3 Luke	090103108987	Cousin	10	Edit Delete	Add Tier 2	
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NOTE: Your final proportion to that property should be at 100%. After keying in details of each beneficiary/s, click "Save". The details will then be added to the list (refer to Blue box above)

(d) The next step is to click on "Add Tier 2" for each beneficiary of Tier 1.

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No <sup>*</sup> Fullname	Identification	* Relationship	Proportion(%)	+ Action	<u>^</u>	
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2 Betty	190127109876	Niece	60	Edit Delete	Add Tier 2	
Beneficiary Tier 1 for (Seni Mor						
Fullname						
Luke	Palationship		Properties (9/)			
	Relationship Cousin		Proportion (%)			



(e) Fill in the information of the Tier 2 beneficiary. (in this sample, Douglas).

Beneficiary(ies) Tier 2 list for (Doug	jlas)		
Show 10 v entries		Search:	
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-			
Beneficiary Info Tier 2 for (Doug	jlas)		
Fullname			
NRIC / Passport	Relationship	Proportion (%)	
		1-100	
Save			

- (f) Please repeat and complete Part (d) and (e) of this section for the Tier 2 Beneficiary for each of the Tier 1 Beneficiary, if you have more than one Tier 1 Beneficiary.
- (h) You may then click to add on more properties as you wish by following Part (a) and repeat the whole process as mentioned above.



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### Vehicle

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### (b) Please fill in the car registration details and click "SAVE".

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(c) Once you have filled up the details of the vehicle and it has been "Save", the screen below will appear. Please click on "Add Tier 1" to add the name and details of the beneficiary.

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(d) Please fill in the information of the beneficiary who you are bequeathing the vehicle to. Remember to click "SAVE".

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- (e) Once you have filled in the information, remember you have to click on "Add Tier 2" to complete the process.
- (f) You may add as many vehicles you own under your name. If the vehicle is sold during your lifetime, do not worry, the asset then becomes absolute and this does not affect your will.



### **Bank Account**

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(c) Once the bank information is "SAVE", click on "Add Tier 1" to add the details of the person you wish to bequeath the monies in the bank account to.

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Main Personal Det	ails Executor Details Property	Vehicle Bank Account	Jewellery	Shares / Bonds	Miscellaneous				
Step 4: Fill in your asset(s) info and a	assign beneficiar(ies)								
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(d) Please fill in details of the Tier 1 beneficiary. Repeat the process/steps if you wish to add more beneficiaries and also Tier 2 beneficiary/s

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NRIC / Passport	Relationship		Proportion (%)	
			1-100	
Save				
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### JEWELLERY

#### NOTE: JEWELLERY INCLUDES WATCHES AND ANY OTHER ACCESSORIES

(a) To start keying in information of your jewellery, make sure you are on the "Jewellery" tab and please click "Add" to start adding the list of items.

Ma	in Personal Details	Executor Details	Property Vehic	le Bank Accou	t Jewellery	Shares / Bonds	Miscellaneous		
Step 4: Fill in your	asset(s) info and assig	n beneficiar(ies)						_	
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(b) Fill in the details of the jewellery. You may also add a picture or image of the jewellery so that it could easily be identified. If there is no serial number, you can write "**none**".

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Save							-
	©WillHelpU.net 2021	* Privacy Policy * * Terms & Co	nditions *				
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(c) Once you have filled in the details of the jewellery, click SAVE. Click on "Add Tier 1" to add the information of your beneficiary/s.

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#### (d) Fill in the information of the Tier 1 Beneficiary. Thereafter, click "SAVE".

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NRIC / Passport	Relationship		Proportion (%)			
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Back Next						



(e) Once you have saved your tier 1 beneficiary details, your page should appear as seen below. You will then need to click and add "Add Tier 2" beneficiary.

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- (f) Once you have filled in the information for Tier 2 beneficiary, you may repeat step (a) to (f) of this section to add more items of your jewellery and watches.
- Note: For watches and jewellery, we recommend giving each item to an individual beneficiary rather than sharing the item amongst a few people. The reason for this is because it is difficult to split the jewellery or watch unless your intention is for them to sell it.



### **Shares and Bonds**

(a) Click on the "Shares/Bonds" tab and click on "Add" to start this section.

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Main	Personal Details	Executor Details	Property	Vehicle	Bank Account	Jewellery	Shares / Bonds	Miscellaneous			
Step 4: Fill in your asse	t(s) info and assigr	beneficiar(ies)									
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(c) Once the details of the share/ bonds are entered, please click "Add Tier 1" to add the beneficiary.

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	Main	Personal Details	Executor Details	Property	Vehicle	Bank Account	Jewellery	Shares / I	Bonds	Miscellaneou	s		
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Showing 1 to 1 Share/B CDS A 1234	1 of 1 entries Bonds Detail Account Num 567899 rity Company	ber	,		TNB			1000					xt

(d) Fill in the details of the beneficiary/s. Click **SAVE**. Please remember to "**Add Tier 2**" after you have completed Tier 1 Beneficiary.

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Beneficiary Tier 1						
Fullname						11
DEF						
NRIC / Passport	Relationship		Proportion (%)			
710511109087	Brother		100			
Save						
ack Next						



(e) Fill in the details for the Tier 2 beneficiary. Thereafter, click "SAVE".

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NRIC / Passport	Relationship	Proportion (%)		
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Save				
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(f) Repeat step (a) to (f) of this section to add more items to the list.



### 10. Miscellaneous

### Note: This is for any items which do not have a category in any of the tab. It could be your pet, your art collection and any other items you want to bequeath to your loved ones.

(a) In the Miscellaneous tab, click "Add" to start adding your list of items.

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Main Personal De	etails Executor Details	Property Vehic	le Bank Account	Jewellery	Shares / Bonc	s Miscellar	neous		
Step 4: Fill in your asset(s) info and	assign beneficiar(ies)								
List of Miscellaneous Items									Add
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(b) Please fill in the details of the items. Press "SAVE" when you have completed. You may add an image or photo so that the item could easily be identified. Click on "Choose File to add image.

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(c) Click save once the details are filled in and click "Add Tier 1" to add the details of your beneficiary.

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Main Personal	Details Executor Details	Property Veh	iicle Bank Account	Jewellery	Shares / Bonds	Miscellaneous		
Step 4: Fill in your asset(s) info a	nd assign beneficiar(ies)							
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(d) Once the detail of the Tier 1 beneficiary is added, remember to click on "Add Tier 2".

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(e) You may add as many items as you wish. Just repeat steps (a) to (d) of this section to add more items.



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### Payment, Your Will and Witness

Once you have completed filling in all the information, click "MAIN" on the tab.

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Step 4: Filin your as	set()) info and assign beneficiar(ies nd(s)	)				Ac
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On the MAIN PAGE, click "PAYMENT" to view the will that you have drafted.

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tep 1: Create a title of your Will				
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ONCE PAYMENT IS MADE, YOU MAY DOWNLOAD YOUR WILL FROM THE MAIN PAGE. A PDF ICON WILL APPEAR.

### WITNESS

Print the Will. You will need 2 witnesses. The role of a witness is to confirm that the Will has been signed by you and you were of sound mind when you executed the Will.

The 2 appointed witnesses will sign the Will to verify that they have witness you signing and acknowledge your signature. Essentially, anyone can witness your will, as long as they are not a named beneficiary to your Will, of sound mind, not blind and over 18.

IMPORTANT: THE WITNESS CANNOT BE A BENEFICIARY NAMED IN YOUR WILL.

