Instructions For
Gifting of Personal Items Memo

Creating your Memo:

- Please provide a detailed description for each item to ensure it does not get mixed-up with another item
- Identify each recipient by full name and indicate your relationship to them
- Sign and date the Memo
- Store the executed Memo in a safe place, alongside your Will
- Inform your executor about the existence of your Memo

Our template allows you to add items and change gifts and recipients, without having to create a whole new Will.

Amending your Memo:

- Edits made to your Memo may be questioned for authenticity, even when dated and initialed. We therefore recommend completing a new template whenever you wish to make changes to an item or recipient.
- When storing your new Memo with your Will, make sure any previous copies are removed.
- Ensure that the gifts and directions in the Memo do not conflict with any specific gifts you have made in your Will, as the gifts in the Will take priority

Although your executor is not legally obliged to distribute your personal belongings in accordance with your Memo, you should feel confident that they will respect your wishes.

Personal Belongings Memo of:

_____

Guide to Assist My Executor(s)

I recognize that this Memorandum regarding the distribution of certain of my personal belongings does not have binding legal effect, but I wish for my Executor to follow this Memorandum as though it formed a part of my Will. If my Executor has discretion regarding the distribution of these items, I request my Executor to exercise that discretion in accordance with my wishes, as set out below. In the event of any conflict between what I have provided for herein and in my Will, the terms of my Will shall govern.

Accordingly, I request my Executor to deliver the following items to the following recipients:

Item	Recipient

Signed by me this [   ] day of [   ] , 20[   ] .

_____

Signature:

Item	Recipient

Signed by me this _____ day of _____ , 20 _____ .

_____
Signature: