



Matters Which Can be Dealt With in Directions to Trustees

Directions to Trustees are intended to provide general guidance to the executor or trustee of a person's estate following their death.

While the document is not legally binding it can have strong moral sway.

Directions to Trustees are a very personal document and can deal with a range of issues including:

- Wishes in relation to assets which the will maker may have effectively controlled during their lifetime, but will not in fact form part of their estate, for example assets in family trusts, superannuation funds or offshore entities.
- The names of advisers or family friends from whom assistance is to be obtained in relation to financial planning, accounting services, legal advice, insurance brokerage, stockbroking or religious guidance.
- Personal assets, particularly those with emotional value such as jewellery, collections, other personal effects or family heirlooms.
- Any charities or causes that the will maker would like the beneficiaries to consider.
- The location of important documents such as deeds, title records and financial information.
- Any wishes or directions in relation to the way in which infant children should be cared for.
- Directions in relation to funeral arrangements and burial.
- Any other matters that the will maker would like their trustees to take into account.