

Matters that can be dealt with in a Letter of Wishes

A letter of wishes is 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. A letter of wishes is a very personal document and can deal with a range of issues including:

1. wishes in relation to assets which the willmaker may have effectively controlled during their lifetime, but will not form part of their estate, for example assets in family trusts, superannuation funds or offshore entities;
2. the names of advisers or family friends from whom assistance should be obtained in relation to financial planning, accounting services, legal advice, insurance brokerage, stockbroking, religious guidance or other matters;
3. personal assets, particularly those with emotional value such as jewellery, items of collection, other personal effects or family heirlooms;
4. any charities or causes that the willmaker would like the beneficiaries to consider;
5. the location of important documents such as deeds, title records and financial information;
6. any wishes or directions as to how infant children should be cared for;
7. directions in relation to funeral arrangements and burial; and
8. any other matters that the willmaker would like their executors or trustees to take into account.