

NASIB – Family Protection & Estate Planning Worksheet

السَّلَامُ عَلَيْكُمْ وَرَحْمَةُ اللَّهِ وَبَرَكَاتُهُ

Assalamu'alaikum warahmatullahi wabarakatuh

May the peace, mercy, and blessings of Allah be with you.

This simple worksheet will help you organize your family and assets so they can be protected and passed on correctly. You do NOT need legal knowledge to complete this.

- ✓ No exact numbers needed
- ✓ Skip anything you're unsure about
- ✓ We will guide you step-by-step after submission

Many families complete this together with their spouse.

1. Personal Information

Full Name: _____

Email: _____

Phone Number: _____

State you live in: _____

2. Family Information

Tell us about your family:

What is your status? Single Married Divorced Widowed

Spouse Name (if applicable): _____

Do you have children? Yes No. If yes, how many: _____

Are any of your children from a previous relationship? Yes No

Do you have any children under 18? Yes No

If yes, who would take care of them?

Are your parents alive? Both One None

Do you financially support anyone? Yes No

If yes, who? _____

Do you have any dependent with special needs? Yes No. Notes: _____

3. Assets

What do you currently own? (Check all that apply)

- Home
- Rental property
- Bank accounts
- Investments / retirement
- Business
- Life insurance
- Digital assets (crypto, online accounts, etc.)
- Other: _____

Do you own property or assets outside your state?

- Yes
- No

Estimated total assets:

- Under \$100K
- \$100K–\$500K
- \$500K–\$1M
- \$1M+

4. Decision Makers

Who would make medical decisions for you if you are unable?

Primary person you trust to handle your affairs:

Backup person (optional):

5. Goals & Preferences

What matters most to you? (select up to 3)

- Protect my family
- Make things simple for my spouse/family
- Follow Islamic principles
- Avoid court/probate

- Protect my assets
- Avoid family conflict

Have you created a will or trust before? Yes No

6. Readiness

How ready are you to move forward?

- Ready to start now
- Soon (1–2 months)
- Just exploring

7. Plan Preference (Optional)

- Simple protection (Will)
- Full family plan (Trust)
- Advanced (business / complex)
- Not sure

8. Final Notes

Anything else we should know?

Signature (optional):

Date:

Next Steps

We will review your information, prepare a structured plan, and guide you step-by-step.
Some early clients may qualify for discounted pricing and priority service.