BEFORE OUR PLANNING MEETING

Making sure your plan matches your wishes

A short guide for clients who would like their estate to follow Islamic inheritance rules.

Why this matters

In a typical estate plan you choose who gets what. In Islamic succession, the shares of the main heirs are fixed. Your plan works around those shares. Accounts with a named beneficiary, joint accounts and property titles can send assets to someone regardless of that division. At our meeting we will list each asset and how it passes, so you can see where it matches your wishes and where it may not.

Before we meet

1. Optional: try Raashid at raashid.com. It is free, takes about five minutes, and runs privately on your device. Its worksheet at raashid.com/worksheet helps you gather what your attorney will need.
2. Make a list of your accounts, policies, retirement plans and property, and who is named on each.
3. Note any debts, mortgage or obligations, and any relatives or assets in other countries.
4. If you rely on a scholar or an attorney, tell us. We will work with them.

What to expect

- A meeting of 45 to 60 minutes. Nothing is decided in it.
- You can bring your spouse or adult children, and your attorney or scholar if you wish.
- We will list questions for your attorney and your scholar to take away.

Good to know

- This is general information. It is not legal, religious, or financial advice.
- We do not give religious rulings or draft wills. Your scholar and your attorney do.
- Raashid is an independent free tool. We do not endorse it, and it does not endorse us.

Firm: [Firm name]
Advisor: [Name]
Phone / email: [Contact]
Meeting: [Date and time]