



GUIDELINES FOR ETHICAL WEALTH TRANSFER AND INHERITANCE PLANNING

The Guidelines recommend that an Ismaili murid seeking to dispose of his or her wealth, whether during his or her lifetime or upon death, should do so through prudent planning, in an ethical manner, and consistent with the principles of natural justice and equity.



These guidelines:

- ✓ Aid reflection and dialogue with family and professional advisors
- ✓ Treat men and women equally
- ✓ Consider the needs of heirs, moral, and vulnerable dependents
- ✓ Encourage regular communication and review
- ✓ Are consistent with the laws of the land
- ✓ Are not intended to offer any legal advice

Ethical wealth distribution can be done:

- ✓ Upon death through inheritance planning
- ✓ Or during one's lifetime

The guidelines are based on the ethical principles of natural justice and equity:

- ✓ Fairness
- ✓ Kindness
- ✓ Generosity
- ✓ Empathy

For more information, visit
the.ismaili/cab or scan the QR code

