

## **WILL INSTRUCTION SHEET**

## IMPORTANT DETAILS WE NEED TO KNOW IN THE PREPARATION OF YOUR WILL

Do your best to complete the details asked in this document to enable us to advise you and prepare your will. Wherever a  appears, tick whichever is applicable.

### Details We Need To Know About You

1. What is your full name by birth? \_\_\_\_\_
2. Are you known by any other name and if so, please provide full details:  
\_\_\_\_\_
3. What is your residential address? \_\_\_\_\_
4. What is your occupation? \_\_\_\_\_
5. Are you married?  
 Yes       No
6. If you are married, is your marriage a  
 Legal marriage?       or a defacto marriage?  
(please tick whichever is applicable)
7. If you are not married, are you engaged to be married?  
 Yes       No
8. Are you a permanent resident of Australia?  
 Yes       No

Details About Your Executor And Trustee

The Executor is the person who will be responsible for administering the estate and should be capable and available.

Names Of Your Executors And Trustees

a) Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Occupation: \_\_\_\_\_

b) Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Occupation: \_\_\_\_\_

c) Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Occupation: \_\_\_\_\_

The Trustee would be responsible for administering any monies that are held in trust for any persons under the age of which you decide the estate should be distributed to them. (if you want more than one Executor, or one as Executor and another as Trustee, then please indicate which persons you would prefer in which role).

The law provides for the Trustee's investment powers to be limited. They may be expanded under the will to allow the Trustee to invest the monies further than the law allows but in a nevertheless, sensible manner.

Do you wish the powers of the Executor or Trustee to be expanded?

Yes       No

Details Of A Guardian

Should you have any minor children, you may wish to express your desire as to who you would prefer to look after those children. This will not be binding in any Court, however, is an expression of your intention.

The names of those persons to be guardians of the minor children in the event that your spouse (or former spouse who has custody) dies before you are:-

Not applicable

a) Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Occupation: \_\_\_\_\_

b) Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Occupation: \_\_\_\_\_

The People You Want To Benefit Under Your Will

a) Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Age or Date of Birth (if known): \_\_\_\_\_

Address: \_\_\_\_\_

Current occupation: \_\_\_\_\_

Do they have any children?

Yes       No

b) Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Age or Date of Birth (if known): \_\_\_\_\_

Address: \_\_\_\_\_

Current occupation: \_\_\_\_\_

Do they have any children?

Yes       No

c) Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Age or Date of Birth (if known): \_\_\_\_\_

Address: \_\_\_\_\_

Current occupation: \_\_\_\_\_

Do they have any children?

Yes       No

d) Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Age or Date of Birth (if known): \_\_\_\_\_

Address: \_\_\_\_\_

Current occupation: \_\_\_\_\_

Do they have any children?

Yes       No

*NOTE: Should there be further beneficiaries, then please attach an extra page or photocopy these pages and complete the list.*

Has there be any specific relation such as a spouse, ex spouse or child from your current, or previous marriage, or any other person, that may be financially dependant upon you that you have left out of this section of the instructions who you specifically do not wish to benefit under your will?

Yes       No

If you have left someone out, please provide details as to why you believe they should be left out as a beneficiary under your will:

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Do you want a non resident to benefit under your will?

Yes       No

If yes, please name the beneficiary, their country of residence and the type of gift they are to receive:

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Charities

Do you want a charity to benefit under the will?

Yes       No

If yes, please identify the charity and describe the gift you wish to give.

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Life Tenancy

Do you wish anybody under the will to be given property for the term of their life only with the property then being given to someone else upon that person's death?

Yes       No

If yes, please name the person who you wish to receive the property for their life only and then name the person or persons who is to be given the property after the death of the first person and identify precisely, the property which you wish to leave on these terms:

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Specific Gifts

Do you want to leave any specific gifts, if so, please list them as follows:

	What is the Asset?	Current Asset Value (if known)	Date first acquired (approximate is sufficient)	How is the Asset owned? Solely yours or Jointly?	Who is to receive the Asset?	If not all of the Asset, what percentage (%)	Is the Asset Mortgaged, under finance, or used as personal security?
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							



Your Residential Home

Do you own a residential home?

Yes       No

If yes, is it with another person? If you own the property with another person, is the ownership as a:

Tenant in common?

Or

Joint tenant?

(please tick one)

Who is the owner of the property? \_\_\_\_\_

What is the approximate value of the home and when was it acquired? \_\_\_\_\_

\_\_\_\_\_

Do you have any preference as to who receives the residential home upon your death?

Yes       No

The Remainder Of Your Estate

Do you want the balance or remainder of your estate to be paid to some persons in which case, please list as follows:

	Name of Asset?	Beneficiary	What percentage of the remainder (%)?
1.			
2.			
3.			
4.			
5.			
6.			

Funeral Arrangements

Would you prefer to be:

Buried?

Cremated?

Other?

Please indicate: \_\_\_\_\_

Have you pre-organised your funeral?

Yes  No

If yes, with whom have you organised the funeral and please provide the details:

Name of funeral organisation: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No: \_\_\_\_\_

Your Current Will

Do you have a current will and if yes, please provide a copy.

Yes  No

Your Contact Details

You can be assured that we will contact you with discretion and confidentiality however, it is best that we have your contact details:-

Phone No: (w) \_\_\_\_\_

(h) \_\_\_\_\_

(m) \_\_\_\_\_

Email address: \_\_\_\_\_

Mailing address: \_\_\_\_\_

\_\_\_\_\_