

Will Instruction Sheet

Please complete this form with as much detail as you can. If you are unsure of anything please write your question on the form.

1.	Personal information
1.1	Your full name and residential address:
1.2	Your occupation:
1.3	Do you have an existing Will? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, provide us with a copy if you have it
1.4	What is your marital status? <input type="checkbox"/> Single <input type="checkbox"/> Engaged to _____ (name) <input type="checkbox"/> Married to _____ (name) <input type="checkbox"/> Defacto relationship with _____ (name) <input type="checkbox"/> Married to but separated from _____ (name) <input type="checkbox"/> Divorced from _____ (name) Note: When you get married, your Will is automatically cancelled, UNLESS the Will is specifically made 'in contemplation of marriage' to your spouse.
1.5	Do you have any children (natural or legally adopted)? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, list their name, age, and address. If no, go to next question. Child 1 Name: Age: Address: Child 2 Name: Age: Address: Child 3 Name: Age:

Address:	
2.	<p>Executors</p> <p>Your executor is the person named in your will who has the power to deal with your assets after you die. You should nominate a person that you trust to undertake this task. We normally recommend that you nominate an executor and a back up executor (in case your first executor dies before you). If you wish you can nominate two people to be your joint executor.</p>
2.1	<p>First Executor</p> <p>(a) Full Name(s);</p> <p>(b) Address(es);</p> <p>(c) Relationship to you (if any) [<i>ie "brother"</i>]:</p>
2.2	<p>Backup Executor (optional)</p> <p>(a) Full Name(s);</p> <p>(b) Address(es);</p> <p>(c) Relationship to you (if any) [<i>ie "brother"</i>]:</p>
3.	<p>Guardian of minor children</p>
3.1	<p>Do you wish to nominate a guardian of your minor children (if any)? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, provide full Name, address and relationship to you (if any):</p>
4.	<p>Assets</p>
4.1	<p>Do you own any real estate (i.e. your home, an investment home, vacant land, commercial property, farming land and so on)? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, please provide full description of all real estate owned and if owned as joint tenants or tenants in common.</p>
4.2	<p>Do you own any shares in listed companies? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If yes, please provide details of the companies in which you own shares or an approximate value of the total amount of shares held.</p>

4.3 Do you own a business? Yes No

If yes, who owns your business (ie yourself or company, trust or partnership)?

4.4 Are you a trustee, appointor or beneficiary of any trusts, such as a family trust or unit trust? Yes No

If yes, provide name of Trust, a copy of the Trust Deed and position or interest held and description of what the trust does (i.e. does it own a business, or land? etc)

4.5 Do you hold a life insurance policy? Yes No

If yes, who is your beneficiary?

4.6 Do you have a self managed superannuation fund? Yes No

If so, please provide us with your binding death nomination form if you have it.

4.7 List any assets (other than those already noted above) that you specifically want to gift in your will. For example jewellery, art, vehicles or other valuable property.

5. Disposal of body

5.1 Do you want to nominate how to dispose of your body, or organ donation in your will.

Yes No If yes, we will discuss with you further.

6. Specific gifts (optional)

6.1 This section is optional. If you wish to gift any of your assets to a specific person, fill out the details below. Otherwise, go to the next section.

6.2 Specific gifts (insert for each gift, the name of beneficiary, address, relationship to you, and whether to take place before or after distribution of the rest of the Estate).

Asset description:

Full name(s) of person(s) receiving Asset:

Address(es) of person(s) receiving Asset:

Asset description:

Full name(s) of person(s) receiving Asset:

Address(es) of person(s) receiving Asset:

Asset description:

Full name(s) of person(s) receiving Asset:

Address(es) of person(s) receiving Asset:

7. Beneficiaries of your Estate other than the specific gifts above

7.1 Option 1 – Basic option – to your partner/spouse and then to your children equally (if any)

If your partner/spouse AND your children have died before you, where do your assets go? (ie grandchildren, parents, charity)

7.2 Option 2 – Percentages – split your assets to nominated people in nominated percentages

Person full name:

% of remainder of Estate:

Person full name:

% of remainder of Estate:

Person full name:

% of remainder of Estate:

7.3 Option 3 – Other – if the above do not describe your wishes, please provide details on your wishes below.

8. Other matters

8.1 Would you like to discuss powers of attorney / Advanced Personal Plans with us?
 Yes No

8.2 Do you have any other questions?