

Executors dossier

By completing the particulars in the attached dossier you can minimise the difficulties, delays and costs which may occur if the information must be ascertained after your death.

We strongly recommend that you keep this information up to date.

We suggest your birthday or the time of preparation of your income tax return may be an appropriate time to consider the need for a regular update. The date on which you last reviewed this information should be inserted as indicated at the end of the dossier, above your signature.

For the purposes of capital gains tax, you must maintain records of the purchase price and date of purchase of most assets purchased after 20/8/85. Please record this information as indicated and keep with this dossier records of the transactions (such as contracts, invoices, receipts and the like, or

information as to where your executor could locate such information).

At the same time as you review this information we suggest you should consider the terms of your will.

You should take the time to read your will at least once every 3 years.

Changes in your circumstances may require immediate alteration of your will. Births, deaths, marriages, commencement or termination of de facto relationships divorce, adoption or the acquisition or disposal of property may be relevant in this regard.

Once complete we suggest this information should be kept with any copy of your will which you keep at home with your private papers. If you wish, a copy of this information may be held by us with your original will.

Advisors

Solicitor / Firm	Tel
Accountant / Firm	Tel
Investment advisors	Tel
Stockbroker	Tel
Insurance Broker	Tel
Doctor	Tel
Dentist	Tel
Other	Tel
Other	Tel

Assets

Description	Sole, common, joint or other ownership	Estimated value
Home at		\$
Other real estate		
Leasehold property		
Furniture and effects		
Antiques, works of art, etc		
Amounts owing to you by family members/others (including family trusts & companies).		
Foreign property or assets (if any)		
Other property		
Shares in private companies		
Shares in public companies		
Any Trust/s effectively controlled by you or in which you hold interests (Has a Family Trust Election [FTE] made in been respect of any such trust?)		

Instructions regarding funeral, cremation, burial etc.

Do you wish your body to be Buried Cremated No preference

Have you made provision for organ donation? yes / no

Comments

Is there anyone you wish advised / not advised of your death or disability?

Comments

Date Dossier completed / /

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(Signed)

Date Reviewed / /

.....
(Signed)

Date Reviewed / /

.....
(Signed)