

Instructions for preparation of will

Personal details

Full forenames	Surname
Any former or other name	Email
Address	Tel Home Business Mobile
Date of Birth	Place of birth
Occupation	Marital status

Have you made a previous will?	yes / no	Dated / /
Have you married, divorced entered into or ended a de facto relationship since making a previous will?	yes / no	
Is this will being made in contemplation of imminent marriage?	yes / no	
If yes, date of proposed marriage / /	yes / no	
Have you signed an Enduring Power of Attorney?	yes / no	(If yes, please provide copy)
Have you signed a Binding Superannuation Death Benefit Nomination?	yes / no	(If yes, please provide copy)

Your spouse / partner

Full name	Date of birth
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Children

Full name	Date of birth
Full name	Date of birth
Full name	Date of birth
Full name	Date of birth
Full name	Date of birth
Full name	Date of birth

Other dependants / beneficiaries

Full name	Date of birth
Full name	Date of birth
Full name	Date of birth

Alternate executor/s

Full name	Full name
Relationship	Relationship
Address	Address
Remuneration (if any)	Remuneration (if any)

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 by family members/others (including related companies and trusts)		
Foreign property or assets (if any)		
Other property		
Shares in private companies (and please provide copy of latest ASIC annual return)		
Shares in public companies		
Any Trust/s effectively controlled by you (and please provide full Trust Deed). Has a Family Trust Election [FTE] been made in respect of any such Trust?		
Other investments (bonds, debentures etc.)		
Life insurance policies (on your life or if you are the beneficiary of another)		
Companies or trusts controlled by your superannuation fund		

Details of mortgages / liabilities

Property mortgaged

Mortgagee

Amount secured

\$

Superannuation

Do you have a self managed superannuation fund?

yes / no

(If yes, please provide full Trust Deed)

Full name of fund and trustee

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Are you the beneficiary of any other super funds?

yes / no

Full name of fund and contact details

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Do you have any life insurance over your life through any super fund?

yes / no

Proposed distribution of estate and assets

Provision for spouse / partner

Whole estate

Annuity

Cash gift \$

Release of debts

Specific gifts

Life Interest

Superannuation

Other

Comments

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Provision for children and grandchildren

Whole estate

Annuity

Cash gift \$

Do you intend children to take the share of a deceased parent?

yes / no

At what age are children to take their share?

21

25

other

Are advances or gifts made by you in your lifetime to be taken into account in calculating shares? (attach separate list if necessary)

yes / no

Comments

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Guardian (for children under 18)

Full name

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Address

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Relationship

--

Full name

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Address

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Relationship

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Cash gifts

Beneficiary	Relationship	Amount
Beneficiary	Relationship	Amount
Beneficiary	Relationship	Amount

Specific gifts

Beneficiary	Relationship	Property
Beneficiary	Relationship	Property
Beneficiary	Relationship	Property

Gifts to Charity

Charity Name	Charity Number	Amount
Charity Name	Charity Number	Amount
Charity Name	Charity Number	Amount

Distribution of residue

Beneficiary	Relationship	Share
Beneficiary	Relationship	Share
Beneficiary	Relationship	Share

Special powers

- Investment To carry on business Maintenance and advancement Other

Special provisions

Family Company (eg appoint governing director)

- Family trust Power of appointment Other

Instructions regarding funeral, cremation, burial etc.

Do you wish the body to be Buried Cremated No preference

Comments
