



Checklist to make a Will

Please complete this checklist so far as you are able before your appointment and bring it with you. Not all questions will be relevant to you. If you are unsure of any question, leave it blank and discuss with us on the day.

Important Note

There are some instances where you will need more than a routine Will to protect your estate. Do any of these apply to you?

- | | |
|--|--|
| <input type="checkbox"/> Manage a discretionary trust | <input type="checkbox"/> Own a personal company |
| <input type="checkbox"/> Have a self-managed superannuation fund | <input type="checkbox"/> Pending Family Law proceedings |
| <input type="checkbox"/> You have overseas assets | <input type="checkbox"/> Involvement in blended families |

Personal details

1. Full name _____
2. Residential address _____
3. Preferred occupation description _____
4. Marital Status: single de-facto married separated divorced widowed
5. Full name of partner _____
6. Partner's preferred occupation description _____
7. Do you already have a Will: Yes (please supply a copy) No
8. Full names of children (including step or adopted) & age if under 18 _____

Assets

Assets owned in joint names pass automatically to the survivor upon death of the other joint owner (the Survivorship Rule) and therefore jointly owned assets do not form part of a person's estate and cannot be disposed of by a Will.

It will be helpful for us to understand the size of your estate in protecting your wishes so please complete the following:

House/Real Estate

Address	Owned solely or jointly	Estimated \$ value	Mortgage balance
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Other Assets (share portfolio / Investments)

Institution	Owned solely or jointly	Estimated \$ value
_____	_____	_____
_____	_____	_____

Superannuation (industry fund or SMSF)

Name of fund _____ Current balance \$ _____

Current binding death benefit nomination Yes No

Loans to family members / others (to be brought into account for distribution purpose)

Yes (please provide details) No

Part B- Appointment of Executors and Guardians

Do you want your partner to be the **executor** of your estate? Yes No

If not your spouse, please nominate who:

Full Name _____

Current address _____

Relationship to you _____

If your nominated Executor predeceases you, please nominate a person to be the substitute Executor

Full Name _____

Current address _____

Relationship to you _____

If both parents die before children attain the age of 18 years, do you wish to appoint a **guardian**? If so who?

Full Name _____

Current address _____

Relationship to you _____

Part C- Specific gifts/ bequests

1. Do you wish to make any specific gifts Yes No

2. Is the gift to be made even if your partner survives you? Yes No

Please give the full name and particulars of gift, for each beneficiary

Full Name _____

Relationship to you _____

Description of gift (proportion or % of estate) _____

Part D - Balance of Estate

(ie the balance of your estate after payment of all expenses eg funeral expenses, legal fees, loans, gifts etc)

How do you wish to distribute your estate?

1. To spouse/ partner Yes No

2. To children equally if spouse predeceases? Yes No

3. What if a beneficiary predeceases you?

List beneficiaries other than spouse or children:

General Matters

Do you have any preferences for funeral arrangements such as cremation, burial or a particular cemetery where you would like to be interred?

Additional Notes

