

Will Instructions

Please note this is NOT a legally binding Will.

Once you have completed these instructions return them to our office. We will then prepare a Legal Will which will need to be signed by you, witnessed and dated before it becomes legal.

Wills are free of charge

PARTY 1

Full Legal Name:

Name you are known by:

(if different from your legal name)

Occupation:

Date of Birth:

Age:

Address:

Email:

Phone:

PARTY 2

Full Legal Name:

Name you are known by:

(if different from your legal name)

Occupation:

Date of Birth:

Age:

Address:

(if different from above)

Marital Status *(please tick one)*

Married

De facto
Relationship

Single

Separated

Divorced

How long have you been Married/in a Relationship?

Is there an existing matrimonial, property sharing or relationship property agreement? Yes No

If you are in a relationship, are you intending to get married in the future? If so, your Will can be made in contemplation of such marriage and will not be revoked if you marry. If your Will is not made in contemplation of your marriage and you subsequently marry your partner, your Will will automatically be revoked and you will need to complete a new Will.

Do you want your Will to be made in contemplation of marriage to your partner? Yes No

Children

Do you have any children?

Yes No

If yes, please provide Full Names, Dates of Birth and Ages of you and your partners children.

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Please also give the name of other parent if not your present partner.

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Trustee/s or Executor

(Being the person/s who is to oversee the administration of your estate)

Provide Full Name, Address Occupation & Relationship to you. (Eg: Partner, Parent, or Friend)

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You may also like to appoint an alternative person if the person/s named above cannot act or dies before you.

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Guardian/s of Infant Children:

A guardian is a person appointed to oversee the general welfare, maintenance and education of your children. The person you appoint to be your testamentary guardian, however, does not necessarily have custody of your children.

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Provide Full Name, Address Occupation & Relationship to you. (Eg: Partner or Parent)

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Assets:

What are your major Assets?

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E.G. House, Investments, Life Policies, Car, Boat.

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Please provide details of each.

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Special Bequests:

Do you wish to give someone a specific legacy?

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e.g: Jewellery or Tool collection, a gift of money to a grandchild or charity organisation.

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The Rest of your Estate:

What is to happen to it –
who is it to go to?

Funeral Directions:

Do you have any wishes
regarding burial or
cremation?

If buried, where?

If cremated. What wishes
do you have for your
ashes?

Trust

Do you own a Trust?

Yes

No

If yes, please write the
name of the trust and
describe what assets
are in that trust

Any other Information:

If you have any queries at all or having any questions regarding this form please do not hesitate to contact us.

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