

# WILL INSTRUCTIONS FORM

## Personal Details

Full name (including your middle name):	
Residential address:	
Phone number:	
Email address:	
Date of birth:	
Marital status:	
Occupation:	

## Relationships

Previous spouse (husband/wife) name:	
Current spouse (husband/wife) name:	

## Children/Persons financially dependent upon you

Please list any children, adopted children, step children and any other persons financially dependent upon you including any you are not in contact with.

Full name (including middle name)	Relationship to you	Address	Age/Date of Birth

## Your Estate Assets

\* *“Joint Tenant”* (below) means if you die the other joint asset holder automatically receives your share. *“Tenant in Common”* (below) means if you die your share will pass in accordance with your Will. Please contact us for assistance if you are not sure and we will be delighted to help.

<b>Property you solely own</b>	
Property address:	
Bank accounts:	
Other:	
<b>Property you own as a “Joint Tenant”*</b>	<b>Joint Tenant’s name</b>
Property address:	
Bank Accounts:	
Other:	
<b>Property you own as a “Tenant in Common” *</b>	<b>Name of Other Tenant</b>
Property address:	

## YOUR WILL INSTRUCTIONS

### **Your Executors**

Your executor(s) will be responsible for collecting in the assets of your estate, paying debts, funeral expenses and taxes, and distributing the balance in accordance with your instructions. They will also become trustees of any parts of your estate retained for beneficiaries who are under age. Your executors should be people you know, trust and whom you believe will be willing and able to accept the responsibility. Your executors should be over 18 years' old and can be your beneficiaries or relatives. Most people choose their spouse as their executor. It is wise to nominate a substitute executor in case your first-choice executor is unable to act as your executor.

### **Your Executor**

Full name (including middle name):	
Relationship to you:	
Address:	

### **Substitute Executor No. 1**

Full name (including middle name):	
Relationship to you:	
Address:	

### **Substitute Executor No 2**

Full name (including middle name):	
Relationship to you:	
Address:	

### **Funeral Wishes**

Do you want to be Buried or Cremated?	
Do you have any additional funeral instructions (optional)?	
Do you wish to donate your organs for therapeutic purposes?	
Do you wish to donate your organs for scientific research?	

### **Guardians for Your Children**

If you have any children younger than 18 years old, you should specify who you want to be their guardians.

Please state who you would like your children's guardians to be:

*Guardians?*

Full Names:	
Address:	
Relationship to you?:	

*Substitute Guardians?*

Full Names:	
Address:	
Relationship to you:	

**Gifts in your Will:**

Do you have any specific gifts of assets that you wish to make? If so, please specify the gifts and the recipient. If there is not enough space, please use another sheet of paper.

Full name (including middle name)	Relationship to you	Address	Specific Gift Details

Please specify how you want your Estate to be divided after all specific gifts of assets have been made. For example, if you are married, all of your Estate would usually pass to your husband/wife and then to any children if your husband/wife died before you and then to any grandchildren of a son or daughter who dies before you.

Full name (including middle name)	Relationship to you	Address	Percentage share of your Estate (please ensure you allocate 100%)

If none of the people named above are alive when you die, please advise who you would like to receive your estate.

Full name (including middle name)	Relationship to you	Address	Percentage share of your Estate (please ensure you allocate 100%)

### **Superannuation/Insurance Entitlements**

So that the wishes you have expressed above are carried into full effect you need to consult your financial adviser to ensure that your superannuation binding death benefit nomination and the ownership and beneficiaries of any insurance policies correctly reflect your intentions stated above.

### **Taxation Advice**

We recommend that you seek advice from a tax specialist with respect to the potential taxation implications of the gifts you wish to make in your Will.

<b>MISCELLANEOUS REQUIRED INFORMATION</b>	
1. Are you the owner of any business(es)? If so, please provide details	
2. Are you the director or shareholder of any company(ies)? If so, please provide details	
3. Are you a trustee, a beneficiary or an appointer of any trusts? If so, please provide details	
4. Do you wish to exclude anyone under your will who is financially dependent upon you or who might expect to receive a share of your inheritance? If so, please state their name, relationship to you and explain why they are being excluded.	
<b>YOUR ADDITIONAL REQUIREMENTS</b>	
1. Do you require optional testamentary discretionary trusts? - See our letter for details and price.	
2. Do you require an enduring power of attorney (highly recommended)? - See our letter for details and price	
3. Do you require an enduring power of guardianship (recommended)? - See our letter for details and price	
4. Do you wish to nominate B Legal Lawyers as the solicitors for your executor to use, if legal assistance is required?	
5. Do you have any special requests, instructions or issues you wish to discuss?	

If you die before your Will is prepared and signed by you, would you like your family and any relevant court to consider this document to be a true and accurate reflection of your wishes:	
Name:	
Signed:	
Date:	