

Will Instruction Sheet



CLIENT DETAILS:

Name:			
Address:			
Postal Address:			
Work Phone:		Home Phone:	
Fax:		Mobile:	
Email:			

Do you have an existing will?	Yes / No
Who holds the original of this will?	
Do you intend for this existing will to be revoked by your new will?	Yes / No
Is there a separate Will intended to overseas assets?	Yes / No

Executors: (see Note 1)

Name:	
Address:	
Relationship to you:	

Name:	
Address:	
Relationship to you:	
Is this person: <input type="checkbox"/> an additional primary executor; <input type="checkbox"/> an alternate executor; or <input type="checkbox"/> further alternate executor?	

Name:	
Address:	
Relationship to you:	
Is this person: <input type="checkbox"/> an additional primary executor; <input type="checkbox"/> an alternate executor; or <input type="checkbox"/> further alternate executor?	

Guardians: (see Note 2)

Name:	
Address:	
Relationship to you:	

Specific Bequests: (see Note 3)

* If insufficient space exists to list all details, please feel free to include additional pages

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Name:	
Address:	
Asset:	
Name:	
Address:	
Asset:	
Name:	
Address:	
Asset:	

Right to Residency: (see Note 4)

Resident:	
Resident's Address:	
Resident's Relationship to you:	
Property subject to Residency:	
Remainderman:	
Remainderman's Address:	
Remainderman's Relationship to you:	
Event upon which the right to residency shall expire:	<input type="checkbox"/> Resident moving out or passing away <input type="checkbox"/> Resident re-marrying or entering a de-facto relationship <input type="checkbox"/> Other _____

Additional Structures:)

Do you have a self managed superannuation fund?	Yes / No
Are you the Trustee or Appointor of a Family Trust?	Yes / No
Have you ever entered into a Buy/Sell Agreement with a Business Partner?	Yes / No

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Residue of Estate: (see Note 5)

A standard will leaves the remainder of your Estate to your Spouse or De Facto Spouse and if they fail to survive you, then on equal shares for your children (whether born now or in the future). You do not need to list your spouse and children here.

Do you require a standard will?	Yes / No
At what age do you wish your beneficiaries to gain full access to their entitlements (see note 6)?	<input type="checkbox"/> 18 <input type="checkbox"/> 21 <input type="checkbox"/> 25 Other: _____

Otherwise:

<p>Primary Beneficiaries (see Note 7):</p> <p>Include full name (including middle names), address and relationship to you.</p> <p>If they are not to share equally, please indicate their respective proportions also.</p>	
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<p>Alternate Beneficiaries (see Note 7):</p> <p>Include full name (including middle names), address and relationship to you.</p> <p>If they are not to share equally, please indicate their respective proportions also.</p>	
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Do you require a discretionary testamentary trust will (see note 8)?	Yes / No
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Notes:

1. Your Executors are responsible for administering your Estate from death to the providing of the assets to your beneficiaries (including managing investments for any minors not yet able to receive money under the Estate). You only have to appoint one but may appoint many. Co-executors act together, whilst alternative executors take their place only if the first executor/s is unable or unwilling to act. Your executor must be over 18 years of age to be able to act in any legal capacity.
2. You may suggest a Guardian who is your preference to be responsible for the upbringing of any minor children you may leave. This is not a binding nomination and can be challenged via the Courts by any other party, but it will alert the Court to your preference.
3. You may make a gift of specific assets to certain people that differ from who you are leaving the balance of your Estate. You do not need to list every item that you own – your Executors have the power to make gifts of smaller assets in a manner they think you may have approved of.
4. If you wish to leave a right to reside in a property for life or for a certain period of time or until a certain event occur, but upon that occurring a different person receive title to the property, then you may do this with a right to residency. The resident shall be the person who may stay in the property, rent-free, until the event occurs. Following that, the remainderman is the person who will receive title to the property as owner.
5. The residue of your Estate contains ALL of your assets other than those assets expressly listed above. A person receiving assets are called 'beneficiaries'.
6. If you are leaving to a minor, we recommend carefully considering the vesting age applicable to their entitlements, meaning the age upon which the minor will receive full control of the assets. Prior to this time, your Executor will be responsible for managing and distributing money to the minors on a needs basis (i.e. for education purposes, living expenses and anything else the Executor deems appropriate). 25 years is becoming increasingly common as a vesting age for Estates, as many people consider this an age most children will have gained some financial maturity, although it could be any age greater than 18 years old.
7. Your primary beneficiary/beneficiaries will receive the balance of your estate equally or in the proportions you list. If they pre-decease you, it will usually be left between the remaining primary beneficiaries. Alternate executors only receive assets if all primary .
8. A discretionary testamentary trust is an advanced structure for leaving assets to parties, providing massive benefits. Please see our website for details on these benefits and why you should sincerely consider utilising this more advanced will, but note that in short it provides asset protection and tax savings for your beneficiaries.

Please note that these instructions will not be independently verified and your Will shall be drafted relying on the information contained herein.