

WILLS INFORMATION AND INSTRUCTION SHEET



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Full Name:	
(also known as):	
Full address:	
Postal Address: (if different from above)	
Occupation:	
Husband/Wife's name OR Partner's name, show whether civil union or de facto	
Their occupation:	
Are you living together or separated	
Children's Names: (including dates of birth if possible and the name of the other parent if not your present spouse)	
Partner's Children's Names (including dates of birth if possible)	

List your present assets and liabilities with approximate values of each, spelling out which are your separate property and which are relationship property:

EXECUTORS

Full name and relationship, or if unrelated the address and occupation of person or persons you wish to name as executor(s). This can be a person you wish to benefit or some other person or your solicitor or a combination of these. (You can appoint wife/husband. If one executor named please indicate a substitute if that one dies).

Substitute Executor/s:

Do you have any wishes regarding burial or cremation?

Do you have any special funeral directions?

Do you wish to donate your body or any part of it for medical research, organ transplant or otherwise for the benefit of medical science? If so, you may also wish to formally record this with the hospital or other institution concern.

GUARDIAN for your infant children. Their full name/s and relationship, or if not related, their occupation(s) and address(es).

Specific Gifts.

Do you wish to make any gifts of money or assets in your Will? If so, please give the full names and relationship, or if not related the address(es) and occupation(s) of the recipients and details of what you wish to leave them. If the gift is to your spouse or partner is it to take effect whether they accept what you give them under your will or bring a claim under the Property (Relationships) Act 1976?

Do you wish to give any person a life interest in your estate or any asset(s) of it (i.e. give to that person the use of those during his/her lifetime; with the capital later going to some other person or persons? If so – give full name and relationship, or if unrelated the address and occupation, of the person or persons. Give a breakdown of the part(s) of your estate that are to be left on a life interest. There can be estate protection planning advantages in giving a life interest to your spouse or partner rather than an outright gift, although this may give them the ability to successfully bring a claim as outlined in “Specific Gifts” above.

Who is to receive the residue (ie. The rest of your estate after debts and gifts have been paid. Name and relationship, or if not related, the address and occupation of the beneficiary/beneficiaries.

If any beneficiary dies before you, what would you like to happen to his/her share? Name and relationship, or if not related the address and occupation, of substitute beneficiary required

Do you have the power of appointment of beneficiaries given to you under any trust deed or will or power to appoint trustees of a trust or directors of a company which you can exercise in your will?

Do you want your trustees to have power to carry on any business you have, manage a company which owns a business you have an interest in, or want to make any special provisions for the business or company?

If you are giving any of your close family no benefit under your Will, or less benefit than other members of that part of the family, tell us your reasons, as a close family member in that position may be able to apply to the Court for a share or a greater share of the Estate.

Have you made any promise, whether enforceable or not, to leave the property to somebody by Will? In some circumstances, those promises can be enforced against your estate if you do not fulfill them.

Is there anything else you want to include in your Will?