

INFORMATION FOR WILLS

PART A – PERSONAL DETAILS

QUESTION 1

Full Name Mr Mrs Ms Miss

Date of Birth

Residential Address

Home phone number

Work phone number

Mobile phone number

Email

Occupation

Postal Address (if different to above)

Marital status: Married Separated Divorced De Facto

(IF NO PARTNER PROCEED TO QUESTION 2)

Full Name Mr Mrs Ms Miss

Date of Birth

Residential Address

Home phone number

Work phone number

Mobile phone number

Email

Occupation

QUESTION 2 (IF YOU DO NOT HAVE ANY CHILDREN OR STEP CHILDREN PROCEED TO QUESTION 3)

Full Name	Address	Date of Birth	Relationship (if not a biological child)
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If you have more than 5 children, please attach a list.

QUESTION 3 (IF YOU DO NOT HAVE ANY DEPENDANTS PROCEED TO PART B)

Full Name	Address	Date of Birth	Relationship
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If you have more than 5 dependants, please attach a list.

PART B – ASSET DETAILS

ASSETS (ONLY APPROXIMATE OR “BALL PARK” VALUES ARE REQUIRED)

QUESTION 4 (IF YOU DO NOT HAVE ANY REAL ESTATE PROCEED TO QUESTION 5)

Full Address

Owner

Value

Mortgage

Location of title

\$

Other Real Estate

Sole

Joint

Tenants in common

Full Address

Owner

Value

Mortgage

Location of title

\$

Use (eg holiday home or rental)

Other Real Estate

Sole

Joint

Tenants in common

Full Address

Owner

Value

Mortgage

Location of title

\$

Use (eg holiday home or rental)

If you have more than 3 properties, please attach a list.

QUESTION 5

Institution	Name on account	Current balance
		\$
		\$
		\$
		\$
		\$

If you have more than 5 accounts, please attach a list.

QUESTION 6 (IF YOU DO NOT HAVE ANY SHARES OR OTHER INVESTMENTS PROCEED TO QUESTION 7)

Name of Company	Number of shares	In whose name is it held?	Value
			\$
			\$
			\$

Other Investments:	In whose name is it held?	Value
		\$
		\$
		\$

QUESTION 7 (IF YOU DO NOT HAVE ANY CARS PROCEED TO QUESTION 8)

Name on registration certificate	Make, model & registration	Value
		\$
		\$
		\$

QUESTION 8 (IF YOU HAVE NOT MADE ANY LOANS TO FAMILY MEMBERS PROCEED TO QUESTION 9)

Who was the loan to?	Value	Who lent the money (eg you, a trust, a company etc)
	\$	
	\$	
	\$	

QUESTION 9 (IF YOU DO NOT HAVE ANY GIFTS YOU HAVE MADE TO BE CONSIDERED PROCEED TO QUESTION 10)

Gift to	Description of gift and its value
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QUESTION 10 (IF YOU DO NOT HAVE ANY OTHER SUPERANNUATION (EXCLUDING A SELF MANAGED SUPERANNUATION FUND), PENSION, OR OTHER DEFERRED COMPENSATION PLANS PROCEED TO QUESTION 11)

Super Fund/Company	Who is the member/owner of the plan	Value	Life insurance attached?	
		\$	Yes	No
		\$	Yes	No
		\$	Yes	No
		\$	Yes	No

Have any binding death benefit nominations been made	Yes (if yes please provide a copy)	No
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QUESTION 11 (IF YOU DO NOT HAVE ANY LIFE INSURANCE PROCEED TO QUESTION 12)

Life insurance company	In whose name is the policy held	Who will be the beneficiary of the policy	Value
			\$
			\$
			\$

IF YOU DO NOT HAVE A SELF MANAGED SUPERANNUATION FUND OR AN INTEREST IN ANY TRUSTS OR COMPANIES PROCEED TO QUESTION 14)

QUESTION 12 (IF YOU DO NOT HAVE A SELF MANAGED SUPERANNUATION FUND PROCEED TO QUESTION 13)

Are there any existing SMSFs?

No (proceed to the next question)

Yes if yes, please bring to your appointment:

- A copy of the trust deed
- Any deeds of variation to the trust deed or any changes of trustee documentation
- Any binding death benefit nominations
- The latest financial statements for the SMSF

Name of SMSF	Trustee(s)	Director(s) (if applicable)
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Member name	Approximate account balance	Binding nomination (BDBN) made?		Life insurance in SMSF?	
		Yes	No	Yes	No
		Yes	No	Yes	No
		Yes	No	Yes	No
		Yes	No	Yes	No
		Yes	No	Yes	No

QUESTION 13 (IF YOU DO NOT HAVE AN INTEREST IN ANY TRUSTS OR COMPANIES PROCEED TO QUESTION 14) NOTE: YOU MAY USE PART E TO MAKE ANY ADDITIONAL NOTES

Are there any existing family trusts?

No (proceed to the next question)

Yes if yes, please bring to your appointment:

- A copy of the trust deed
- Any deeds of variation to the trust deed or any changes of trustee documentation
- The latest financial statements for each trust)

Name of Trust	Appointor(s)	Trustee(s)
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Do you have any special wishes in relation to the trust?	Yes (if yes, fill in details below)	No
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Are there any unpaid present entitlements/beneficiary loans?	Yes (provide details)	No
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Are there any family companies?	Yes (if yes, fill in details below)	No
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Company name:

Directors:

Shareholdings:

Do you have any specific wishes in relation to the shares?	Yes (if yes, fill in details below)	No
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Are any of your assets active business assets or do you own or control entities that control active business assets? (CGT small business concessions)

Yes (provide details):

No

QUESTION 14 (IF YOU DO NOT HAVE ANY ASSETS OVERSEAS PROCEED TO QUESTION 15)

Do you own assets overseas? (if yes, do you have an overseas will?)

Yes (provide details):

No

QUESTION 15 (IF YOU ARE NOT THE BENEFICIARY OF AN ESTATE PROCEED TO QUESTION 16)

Are you a beneficiary of an estate or do you have expectations?

Yes (provide details):

No

QUESTION 16 (IF YOU DO NOT HAVE ANY EXISTING AGREEMENTS PROCEED TO PART C)

Are there any agreements or orders that may affect your will? (Binding Financial Agreements, mutual wills)

QUESTION 17

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Certain people are able to make a claim for further provision from your estate. Do you have any children (including ex-nuptial children), dependant grandchildren or a spouse for whom who you do not wish to make provision in your Will?

Yes (provide details):

No

QUESTION 18

Is your preference burial (please advise if you have reserved a particular plot or position) or cremation?

Please note that a clause to this effect in your Will is not binding on your executor.

QUESTION 19

Your Will will be revoked in the event you marry, or your marriage ends (i.e. divorce) UNLESS there is a contrary intention provided for in the Will.

Is it likely that you may marry or divorce following the execution of your Will?

Yes (provide details):

No

QUESTION 20

Is it your wish that E C Legal be employed by your Executor in proving your Will (i.e. obtaining probate in the Supreme Court) and in transacting any legal business in the administration of the Will?

Yes

No

PART C – PRELIMINARY WILL INSTRUCTIONS

DO YOU HAVE ANY PRELIMINARY THOUGHTS OR INSTRUCTIONS IN RELATION TO YOUR WILL(S) AND THE DISTRIBUTION OF YOUR ESTATE(S)?

e.g. appointment of executors

e.g. distribution of your estate in the event of you passing away and in the event of you and your spouse passing away (if applicable)

– for example I'd like everything to go to my spouse and on the death of my spouse everything equally to my children

e.g. specific gifts (i.e. jewellery, family heirlooms)

e.g. guardianship of minor children (if any)

NOTE: YOU MAY USE PART E TO MAKE ANY ADDITIONAL NOTES

Yes (*if yes, fill in details below*)

No

PART D – PRELIMINARY ENDURING POWER OF ATTORNEY INSTRUCTIONS

DO YOU HAVE ANY PRELIMINARY THOUGHTS OR INSTRUCTIONS IN RELATION TO YOUR ENDURING POWERS OF ATTORNEY?

e.g. appointment of attorney/s to make financial decisions on your behalf and when you would like the power to begin
(if more than one attorney is appointed you may choose for them to act jointly, severally or by majority)
e.g. appointment of attorney's to make personal decisions on your behalf and when you would like the power to begin
(if more than one attorney is appointed you may choose for them to act jointly, severally or by majority)
e.g. appointment of an agent and an alternate agent to make medical decisions on your behalf

NOTE: YOU MAY USE PART E TO MAKE ANY ADDITIONAL NOTES

Yes (*if yes, fill in details below*)

No

PART E – ADDITIONAL NOTES

PLEASE USE THIS PAGE TO PROVIDE ANY ADDITIONAL INFORMATION / NOTES RELEVANT TO YOUR PERSONAL DETAILS, ASSET STRUCTURE OR WISHES IN RELATION TO YOUR WILL (S) AND/OR ENDURING POWERS OF ATTORNEY.

Yes (if yes, fill in details below)

No