

Will Instruction Sheet

Please complete each question and return this instruction sheet to us so that we may prepare your draft Will. Should you have any questions, please do not hesitate to contact this office.

Please advise whether you wish to make this Will in contemplation of your upcoming marriage. Your marriage will revoke this Will unless your Will is made in contemplation of that marriage. In addition, your Will would also be affected by a subsequent Divorce and we can advise you in this regard.

1. About you

Full name

Current address

Occupation

Email address

Work phone no.

Home phone no.

2. Executors

This is the person/people who will administer your will after you have died. You can choose just one e.g. Your Partner, or any number or combination of people e.g. Your parents, children or siblings. Remember you want people who have some understanding of your affairs and who are also likely to survive you. You can always change your will at a later stage. You can include provisions if one or more should predecease you or, if they don't wish to or cannot act in this capacity.

Example: Appoint your partner as the main executor provided that he/she survives you, IF NOT THEN appoint a parent/s or your brother/sister or your adult children.

a) Appointment

Who you want to appoint, in order. List first choice, then substitutes.

Appointee 1

Full name

Address

Relationship

Phone no.

Appointee 2

Full name

Address

Relationship

Phone no.

Appointee 3

Full name

Address

Relationship

Phone no.

Appointee 4

Full name

Address

Relationship

Phone no.

3. Guardians

a) Do you have any infant children (under 18) or will have in the near future?

YES

NO

b) Who do you want to look after them or who do you want to choose how they are looked after?

The guardian/s does not have to personally look after your children, but they are willing to be responsible for who and how they are looked after. Such a provision is not binding, but acts as an indication of your wishes. The Family Court could override any such provision.

Guardian 1

Full name

Address

Relationship

Phone no

Guardian 2

Full name

Address

Relationship

Phone no

c) Do you want your executor/s to provide funds from your estate for the caring of your children?

YES

NO

d) Have you left monies in Trust for your infant children until they reach a certain age (i.e. 18 or 21)?

YES

NO

4. Funeral Arrangements

a) Do you want to be buried or cremated?

b) Where do you want to be buried or cremated?

c) Are you a registered organ donor?

YES

NO

d) Can your body parts be used for transplants?

YES

NO

e) Do you want your body donated to medical science for research?

YES

NO

f) If there are expenses involved do you want your estate to bear the costs?

YES

NO

g) Do you want to pay for distant relatives to attend your funeral?

YES

NO

h) Do you want to provide for the refreshments at your funeral?

YES

NO

5. Specific Bequests

Specific bequests are particular gifts to individuals. For example: a watch, a car, a painting, furniture, tools, jewelry, shares, forgiveness of a previous debt. List items and give names and addresses of the person who you wish to leave to.

Full name

Items

Full name

Items

Full name

Items

Full name

Items

6. Pecuniary Legacies

A pecuniary legacy is a gift of a particular sum of money to a particular person. This may be for education, or a gift to a charity.

To **Amount \$**

To **Amount \$**

7. Residuary Beneficiaries

A residuary beneficiary will receive the remainder of your estate after any specific gifts or pecuniary legacies have been disbursed. It is advisable to include a residuary clause in case one of your gifts should fail. If, for example, you do not have any of the specific gifts or legacies you may decide to leave everything to your partner, and if they don't survive you, then on to your children and then grandchildren. You may state certain percentages for each person. You need to denote if your partner's children and stepchildren are to be included? Do you want to name specific children/people? AND do you want to specifically exclude anybody?

If appropriate, these issues can create friction, please consider carefully.

Full name **Relationship** **Percentage**

Full name **Relationship** **Percentage**

Substitute should the beneficiary predecease

Full name **Relationship** **Percentage**

Full name	Relationship	Percentage
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Full name	Relationship	Percentage
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Full name	Relationship	Percentage
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8. Other

Are there any other questions or any other items that you feel are to be attended to or included or that you wish to discuss prior to the drafting of your Will?