



## Will Instructions

***Please note this is not a legally binding Will document***

We will prepare your new will once these instructions are returned to our offices.

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Date

Contact Phone

### **PARTY 1**

Full Legal Name:

Name you are known as:

*(if different from your legal name)*

Occupation

Address

### **PARTY 2**

Full Legal Name:

Name you are known as:

*(if different from your legal name)*

Occupation

Address

### **MARITAL STATUS**

Married

De Facto

Single

Separated

Divorces

Widowed

How long have you been married or in a de facto relationship?

Is there an existing matrimonial, property sharing or contracting out agreement?

## **CHILDREN**

Do you have any children?                      Yes                      No

If yes please provide full names, dates of birth and ages of you and your partners children

Please also give the name of the other parent if not your present partner.

## **TRUSTEE/EXECUTOR**

This is the person charged with overseeing the administration of your estate

Provide full name, address and occupation and relationship to you

You may also like to appoint an alternative person if this executor cannot act or dies before you

## **GUARDIAN/S OF INFANT CHILDREN**

A guardian is a someone appointed to oversee the general welfare, education and care of your children. The person you appoint as guardian does not necessarily have custody of your children.

Please provide the full name, address, occupation and relationship of the person to you.

## **ASSETS**

What are your major Assets?

Give details of each Asset

## **SPECIAL BEQUESTS**

Do you wish to give someone an item that was special to you?  
Eg Jewellery, a gift of money, a collection.

## **THE REMAINDER OF YOUR ESTATE**

What is will to happen to your Estate - Who will it go to?

## **FUNERAL DIRECTIONS**

Do you have any specific wishes for your funeral?

Would you like to be buried or cremated?

If cremated, what do you wish to happen with your ashes?

## **TRUST**

Do you own a Trust?

Yes

No

If yes, please state the name of the trust and what assets are under that trust

**GENERAL**

Any other information you wish to add