INFORMATION FOR WILLS / POWERS OF ATTORNEY

PART A – PERSONAL DETAILS

QUESTION 1

YOUR DETAILS

Full Name ☐Mr ☐ Mrs ☐ Ms ☐ Miss	Address	D.O.B
Home phone number	Mobile phone number	Work phone number
Email:		
Occupation:		
Address for correspondence:		

(IF NO PARTNER PROCEED TO QUESTION 2)

DETAILS OF YOUR PARTNER

Full Name ☐Mr ☐ Mrs ☐ Ms ☐ Miss	Address	D.O.B
Home phone number	Mobile phone number	Work phone number
Email:		
Occupation:		
Address for correspondence:		

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

CHILDREN (INCLUDING STEP CHILDREN)

Full Name	Address	D.O.B	Relationship (if not a biological child)

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

OTHER DEPENDANTS

Full Name	Address	D.O.B	Relationship

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)***

REAL ESTATE

Your main residence ☐ Sole ☐ Joint ☐ Tenants in common

Full Address	Owner	Value	Mortgage
		$	
Location of title:			

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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)			

QUESTION 5

CASH, CHEQUE AND DEPOSIT ACCOUNTS

Institution	Name on account	Current balance
		$
		$
		$

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

SHARES AND OTHER INVESTMENTS

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

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

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

CARS

Name on registration certificate	Make and model	Value
		$
		$
		$

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

LOANS TO FAMILY MEMBERS OR OTHERS

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)***

GIFTS TO BE TAKEN INTO ACCOUNT

Gift to	Description of gift and its value

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)***

SUPERANNUATION, PENSION, OTHER DEFERRED COMPENSATION PLANS

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

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Have any binding death benefit nominations been made	☐ Yes (if yes please provide a copy) ☐ No

QUESTION 11 (IF YOU DO NOT HAVE ANY LIFE INSURANCE PROCEED TO QUESTION 12)

ASSETS – LIFE INSURANCE

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)*

SELF MANAGED SUPERANNUATION FUNDS (SMSF)

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)

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

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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*

TRUSTS / COMPANIES

Are there any existing family trusts?

☐ No

☐ 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)

Do you have any special wishes in relation to the trust? ☐ Yes *(if yes, fill in details below)* ☐ No

Are there any unpaid present entitlements/beneficiary loans?

☐ Yes *(provide details):*

☐ No

Are there any family companies? ☐ Yes *(if yes, fill in details below)* ☐ No

Company name:

Directors:

Shareholdings:

Do you have any specific wishes in relation to the shares? ☐ Yes *(if yes, fill in details below)* ☐ No

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

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

OVERSEAS ASSETS

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 OR AN ESTATE PROCEED TO QUESTION 16)***

BENEFICIARY OF AN ESTATE

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)***

EXISTING AGREEMENTS

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

_____

_____

QUESTION 17 ***(IF YOU DO NOT HAVE ANY DIGITAL ASSETS PROCEED TO QUESTION 18)***

DIGITAL ASSETS

Do you hold or own any digital assets? If yes, please provide details including:

- **Where are the digital assets held or stored?**
- **How can the digital assets be accessed?**
- **If passwords are required to access the digital assets, where are the passwords stored?**
- **Is there a contact person or company that is responsible for managing/storing the digital assets?**
- **What is to happen to the digital assets?**

☐ Yes *(provide details):*

☐ No _____

_____

_____

_____

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ADDITIONAL PERSONAL QUESTION

QUESTION 18 ***(IF YOU DO NOT HAVE ANY FROZEN HUMAN OR REPRODUCTIVE TISSUE PROCEED TO PART C)***

FROZEN HUMAN OR REPRODUCTIVE TISSUE

Do you have any frozen semen/eggs/fertilized eggs (embryos) which you would like to be made available or allow a nominated person (spouse) to make decisions in relation to its use? Or, do you have any other frozen human tissue you would like to include specific directions for its use?

_____

_____

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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

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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 a medical treatment decision maker 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

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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.

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