

**WILL INSTRUCTIONS**

- 1. State your full name, date of birth, address and occupation.
- 2. Details of immediate family (for example, your partner and/or children and step-children including their dates of birth/ages) as applicable. Please use full names. Please also include details of any previous partners if you have recently separated and any estranged children.

3. Do you have an existing Will?            YES/NO  
If Yes, please supply a copy.

4. Please supply a list of your assets which you consider to be included as part of your estate (for example real property, motor vehicles, shares). *This gives us with an overview of your estate and may highlight the need for any special provisions in the Will. We do not require monetary values if you are not comfortable sharing this information.*

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Superannuation and life insurance is dealt with separately – you should check with the trustee of your super fund and life insurer as to who is currently nominated as the beneficiary(s) of your fund / policy. We recommend that if you have not already done so you consider making a Binding Death Nomination. If you have nominated the executor of your Will or your estate to be the beneficiary, your entitlements can be included as part of your estate for distribution pursuant to your Will.

5. Please provide details of any business, partnership, company or trust of which you are directly associated or involved including any agreements pertaining to these associations - *special provision may be required in your Will for these matters.*

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6. Who do you wish to appoint as your executor(s)?  
Please provide full names and addresses and their relationship to you. It is advisable to nominate at least 1 alternate executor in the event your chosen executor is unable to act.

Executor(s):.....  
Alternate Executor(s): .....

7. Who do you wish to appoint as guardian of your children (if you have children under the age of 18 years)?

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8. Do you have any specific gifts (for example jewellery, family heirlooms) or charitable donations to be mentioned in your Will? If so, please advise.

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9. How would you like the balance of your estate (aside from the specific gifts) to be distributed? For example: to your spouse, children, parents or siblings. Please state full names and their relationship to you (if applicable) and what share of your estate they are to receive.

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10. In the event that any of the people mentioned in the previous clause do not survive you, please advise alternate beneficiary(ies).

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11. Do you have any particular wishes that you would like stated in your Will as to the disposal of your body (for example, funeral arrangements, burial or cremation) or whether any part of your body or body tissue may be used for transplant, research or scientific purposes? If so, please state your wishes here.

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12. Please advise any other special requirements you would like contained in your Will or other circumstances that should be brought to our attention in considering your estate planning.

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Signed                    /    /