

To ensure your Will appointment is as quick and easy as possible please bring along your completed Will Instruction form and two forms of current proof of identity such as a driver's licence, passport, or proof of age card.

The following documents may also be useful but not essential. abc

Assets/Holdings	What to bring to your appointment	Check
Real Estate	Copies of rates notices for property you own.	
Vehicles	The model, year, and registration details of any vehicles you own; including motor vehicles, caravans, boats, and/or motor bikes.	
Share/Investments	All security Reference Numbers – these can be found on dividend statements.	
Funeral Arrangements	Details of any prepaid funeral plan/policy and/or funeral bond/prepaid monumental works.	
Bank Account / Term Deposits	Recent bank account statements along with account numbers.	
Superannuation	The name/s of your Fund/s and member number/s.	
Insurance	The company names and reference numbers relating to your life or funeral policies.	
Overseas Assets	Details regarding any international assets you have.	
Other Assets	The trust deeds, partnership agreements, and/or articles of association relating to private companies, partnerships, and/or family trusts. Details of any digital assets such as online betting accounts.	
Liabilities	Details of any outstanding liabilities, such as a home loan or other loans, including loans to family members.	
Tax Returns	If possible, please bring copies of your recent tax returns (individual and any companies/businesses). If you can't access these, we can prepare authorities to obtain from your advisors.	

Assets/Holdings	What to think about <i>before</i> your appointment	Check
Vehicles	Whether there are any loans against any of your vehicles, and to who, these loans are owed.	
Shares/Investments	Whether the shares are held jointly or individually and where your capital gains records are held.	
Funeral Arrangements	Instructions with respect to your burial or cremation.	
Superannuation	Whether there are named beneficiaries and/or whether you have a binding nomination.	
Insurance	Whether you have any beneficiaries nominated in relation to your funeral and/or life policies.	
Furniture and Effects	The estimated value of these items. Any specific items that might need a separate mention in your Will (especially those of a higher value and/or of sentimental value, for example, original paintings and/or service medals).	
Other Information	Your wishes in relation to the guardianship of any children under 18 years of age.	