

Recording Full Names

When we request full names of people we require their first name, middle names and last name. Please ensure you provide the correct spelling of all names. If a person you are appointing as executor or beneficiary in your Will, does not have a middle name, please make a note of this on your Will Instruction Sheet.

Have you ever made a Will?

We include a revocation clause in all Wills to ensure that any previous Wills made by you are revoked and therefore, not effective from the time that your new Will is executed.

It is important that you inform us if you have made a previous Will, and if so, provide us with a copy, of your previous Will. There are many reasons why it is necessary for us to have this information, one main reason being that we can advise you to complete a statutory declaration if your new Will differs greatly from your previous Will. This provides protection against persons wishing to contest your Will following your death.

Relationships

The law allows certain people to claim provision from your estate if they have not been provided for in your Will. There are conditions that such people are required to demonstrate to enable a provision to be awarded to them. However, by providing us with the information regarding the relationship of each person to you, we can advise in relation to provisions being made for them.

Furthermore, if you are choosing not to include a partner, child or other relative, it is important that you provide this information to us so that we can advise you in relation to your obligation to provide for such persons. Such persons are generally those who you are currently providing financial support to.

Children

Please provide information to us regarding your children, including natural children, step-children, adopted or foster children. We require full names and the dates of birth of all children.

Gifts

Many people choose to leave specific gifts to their relatives, friends or organisations. Such gifts are often referred to as bequests or legacies. Common gifts include money, jewellery, motor vehicles, household items etc. In the event that you choose to gift a sum of money, you must specify the exact sum, or if you choose to gift an item, please provide exact details so that the item can be easily identified.

Residue

In the event that you have decided to leave your entire estate to one person (beneficiary), such as a husband leaving his entire estate to his wife, we would advise you to consider appointing a substitute beneficiary to allow for the event of your first chosen beneficiary, predeceasing you.

Executors

The role of an Executor(s) is to administer your estate in accordance with your Will. We are able to provide information to your Executor(s) when required. Your Executor(s) will be responsible for obtaining a Grant of Probate, which they would generally employ solicitors to do.

You may appoint any person who is over the age of eighteen (18) years to be your Executor. You may appoint more than one Executor in the capacity of joint Executors, meaning that all Executors are jointly responsible for administering your estate. In the alternative, you may appoint a substitute Executor, so that if your first appointed Executor(s) cannot act, then your substitute Executor will act. It is encouraged to appoint a substitute Executor to allow for unforeseen events occurring, such as your first appointed Executor(s) relocating or predeceasing you.

Generally, people choose to appoint their partner/spouse, children or other close relatives or friends as their Executors. If you would prefer not to appoint any of these people, you may appoint your solicitor.

Funeral Instructions

It is not a requirement that funeral instructions be specified within your Will, however it is convenient to include such instructions if you have specific wishes. This often alleviates pressure between family/friends when decisions are being made regarding your funeral.

We do require you to indicate if you would like to be buried or cremated, or specify that you choose to refrain from making such decisions yourself and leave the decision to your executor(s).

Additional Information

If you feel that there is important information that Kelly Kelly Legal would require to draft your Will, please provide such information in the area specified on the final page of the Will Instructions sheet.

We also strongly encourage you to prepare the following documents at the same time you prepare your Will:

(We offer a significant discount if you prepare these documents at the same time)

1. Power of Attorney – this document allows you to appoint a person(s) to make financial decisions, sign contracts and pay bills etc., on your behalf if you are not able to.

2. Advance Care Directive – this document allows you to record your wishes, preferences and instructions for future health care, living arrangements, personal matters and end of life.

If you wish to prepare these documents, we will need the full names, addresses, occupations and telephone numbers for the person(s) you wish to appoint. Please refer to separate instruction sheets.

Personal Details

Surname: _____

Given name/s: _____

Other Names Known by: _____

Date of Birth: _____

Occupation: _____

(If retired, please write 'Retired' and your former occupation)

Residential Address: _____

Town/Suburb: _____ Post Code: _____

Postal Address: _____

Town/Suburb: _____ Post Code: _____

Email: _____

Telephone: _____

Mobile: _____

How did you hear about us?

Website White pages Newspaper Ads

Or did someone refer you to us? Yes / No

If so, who referred you? _____

Have you made a previous Will? Yes / No

Have you been married or lived in a de facto relationship? Yes / No

If so, are you currently separated from your spouse/partner? Yes / No

If married, are you divorced from your spouse? Yes / No

Is your spouse/partner deceased? Yes / No

Please answer the following questions to ensure that we receive relevant information in respect of identifying persons who may be entitled to make a claim against your estate:

Do you have a partner (married or de facto) who will not be named as beneficiary? Yes / No

Are you separated? Yes / No

Do you provide financial support to any persons who will not be named as beneficiaries? Yes / No

Do you or your partner have children who will *not* be named as a beneficiary, including adopted and step-children? Yes / No

Do you have children who are disabled? Yes / No

Do you have intentions to enter into a marriage or de facto relationship in the near future? Yes / No

If you have answered 'yes' to any of the above questions we will discuss the entitlements that certain persons may have to make a claim against your estate if they have not been provided with sufficient benefits through your Will.

Spouse or De Factor Partner

(leave blank if not applicable)

Full Name: _____
(include all names)

Date of Birth: _____

Married: Yes / No

Occupation: _____
(If retired please write 'Retired' and your former occupation)

Address: _____

Town/Suburb: _____ Post Code: _____

Email: _____

Telephone: _____

Mobile: _____

Children _____

(including adopted and step-children)

If yes, please provide their **full names** and **date of birth**:

Child 1: _____

Date of Birth: _____

Address: _____

Occupation: _____

Phone Number: _____

Email Address: _____

Child 2: _____

Date of Birth: _____

Address: _____

Occupation: _____

Phone Number: _____

Email Address: _____

Child 3: _____

Date of Birth: _____

Address: _____

Occupation: _____

Phone Number: _____

Email Address: _____

Guardians for children under 18 years _____

Guardian 1

Full Name _____

Relationship: _____

Date of Birth: _____

Address: _____

Occupation: _____

Guardian 2

Full name: _____

Relationship: _____

Date of Birth: _____

Address: _____

Occupation: _____

Grandchildren _____

Do you have any grandchildren? Yes / No

If yes, please provide name of parent and **full names** and dates of birth of the grandchildren.

Name of Parent: _____

Grandchild 1: _____ DOB: _____

Grandchild 2: _____ DOB: _____

Grandchild 3: _____ DOB: _____

Grandchild 4: _____ DOB: _____

Name of Parent: _____

Grandchild 1: _____ DOB: _____

Grandchild 2: _____ DOB: _____

Grandchild 3: _____ DOB: _____

Grandchild 4: _____ DOB: _____

Name of Parent: _____

Grandchild 1: _____ DOB: _____

Grandchild 2: _____ DOB: _____

Grandchild 3: _____ DOB: _____

Executors _____

Appoint Kelly Kelly Legal Yes No

Executor 1

Full Name: _____

Please tick if all personal details provided above

Date of Birth: _____

Residential Address: _____

Town/Suburb: _____ Post Code: _____

Postal Address: _____

Town/Suburb: _____ Post Code: _____

Relationship to you: _____

Telephone: _____

Mobile: _____

Email: _____

Occupation: _____

Executor 2

Full Name: _____

Please tick if all personal details provided above

Date of Birth: _____

Residential Address: _____

Town/Suburb: _____ Post Code: _____

Postal Address: _____

Town/Suburb: _____ Post Code: _____

Relationship to you: _____

Telephone: _____

Mobile: _____

Email: _____

Occupation: _____

Substitute Executor 1

(if the above executor(s) die before you or unwilling to act)

Kelly Kelly Legal Yes No

Full Name: _____

Please tick if all personal details provided above

Date of Birth: _____

Residential Address: _____

Town/Suburb: _____ Post Code: _____

Postal Address: _____

Town/Suburb: _____ Post Code: _____

Relationship to you: _____

Telephone: _____

Mobile: _____

Email: _____

Occupation: _____

Substitute Executor 2

(if the above executor(s) die before you or unwilling to act)

Full Name: _____

Please tick if all personal details provided above

Date of Birth: _____

Residential Address: _____

Town/Suburb: _____ Post Code: _____

Postal Address: _____

Town/Suburb: _____ Post Code: _____

Relationship to you: _____

Telephone: _____

Mobile: _____

Email: _____

Occupation: _____

Funeral Instructions

Would you like to be:

- Buried
- Cremated
- No preference (leave it to my executors to decide)

If Burial

Do you have a preference for a cemetery? Yes / No

Preference: (name of cemetery) _____

If Cremation

Do you have a preference for disposal of your ashes?

- No preference (leave it to my executors to decide)
- Scattered _____ (where scattered)
- Interred _____ (where interred)
- Other _____ (other wishes)

Any other funeral instructions:

Gifts

Specify gifts you wish to be left to a person(s) or organisation(s). Provide sufficient details of gifts to ensure they are easily identified.

NOTE: You do not have to provide specific gifts if you don't want to (some people like to leave jewellery or heirlooms to loved ones specifically).

Gift 1: What is the gift? _____

Full Name: _____

Address: _____

Relationship to you: _____ Age if under 18: _____

Gift 2: What is the gift? _____

Full Name: _____

Address: _____

Relationship to you: _____ Age if under 18: _____

Gift 3: What is the gift? _____

Full Name: _____

Address: _____

Relationship to you: _____ Age if under 18: _____

Gift 4: What is the gift? _____

Full Name: _____

Address: _____

Relationship to you: _____ Age if under 18: _____

Who do you want to leave your estate to? _____

- Everything to my spouse _____ (name)
- Everything to my de facto _____ (name)
- Everything to my children equally _____
- Other: (be specific – ie if you want to leave a percentage to certain people, please specify)

If any of the named beneficiaries predecease you, do their children receive their share? Yes / No

If yes

- Children at age 18 21 25 30
- Including children of spouse or partner
- Equally between all children
- ½ to children and ½ to spouse's children

If the above-named person(s) do not survive you, who do you

want to leave the balance to:

What is the name of your **accountant** and the company they work for?

Accountant's Name: _____

Company: _____

Phone: _____

What is the name of your **financial planner** and the company they work for:

Planner's Name: _____

Company: _____

Phone: _____

Do you own a business? Yes / No

Name of business: _____

Are you a partner in a partnership? Yes / No

Name of Partnership: _____

Name of other partner (s): _____

Do you own a company? Yes / No

Name of Company: _____

Name of Directors: _____

Owners of issued shares in company : _____

Do you have Discretionary Family Trust? Yes / No

(If so, try to bring a copy of your trust deed to your appointment)

Name of Trust: _____

Assets

| Asset Please list all assets that you and your partner have. | Value Estimate the dollar value of the asset | Ownership Who owns the assets? |
|--|--|--|
| Home Address: | | <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust |
| Other real estate Address: Address: | | <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust |
| Primary Bank Account Bank: Account Name: | | <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust |
| Other Bank Accounts Bank: Account Name: Bank: Account Name: | | <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust |
| Cars / Caravans / Boats etc Vehicle: Type/make: Vehicle: | | <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust <input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint |

| | | |
|---|--|--|
| <p>Type/make:</p> <p>Vehicle:</p> <p>Type/make:</p> <p>Vehicle:</p> <p>Type/make:</p> | | <p><input type="checkbox"/> Company <input type="checkbox"/> Trust</p> <p><input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust</p> <p><input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust</p> |
| <p>Shares</p> | | <p><input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust</p> |
| <p>Bonds</p> | | <p><input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust</p> |
| <p>Life Insurance Policies</p> <p>Name of Company:</p> <p>Type of Policy:</p> <p>Name of Company:</p> <p>Type of Policy:</p> | | <p><input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust</p> <p><input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust</p> |
| <p>Superannuation Funds</p> <p>Name of Fund:</p> <p>Name of Fund:</p> | | <p><input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust</p> <p><input type="checkbox"/> Husband <input type="checkbox"/> Wife <input type="checkbox"/> Joint <input type="checkbox"/> Company <input type="checkbox"/> Trust</p> |

Liabilities

| Liabilities | Value Estimate the dollar value of the asset. |
|--|---|
| Mortgage Bank: Account Name: | |
| Loans Bank: Account Name: | |
| Credit Card Bank: Account Name: | |

Would you like to suggest that your Executors use the services of Kelly Kelly Legal to assist them to administer your estate and obtain a Grant of Probate if required? Yes (default answer)

No

Notes & Questions:

Date: _____

Name: _____

Signature: _____