

4. CHILDREN / DEPENDANTS	CHILD 1	CHILD 2		
<p>Full name</p> <p>Address</p> <p>Occupation</p> <p>Date of birth, Age</p> <p>Relationship to testator (you)</p> <p>Financially dependant?</p> <p>Number of children (if any)?</p> <p>Child of present or previous marriage / relationship?</p> <p>Does child have special needs because of a physical or intellectual handicap or drug, alcohol or gambling addiction?</p>				
	CHILD 3	CHILD 4		
<p>Full name</p> <p>Address</p> <p>Occupation</p> <p>Date of Birth, Age</p> <p>Relationship to testator (you)</p> <p>Financially dependant?</p> <p>Number of children (if any)?</p> <p>Child of present or previous marriage / relationship?</p> <p>Does any child have special needs because of a physical or intellectual handicap or drug, alcohol or gambling addiction?</p>				
5. YOUR ASSETS	DETAILS		OWNER	VALUE
<p>Real Estate</p> <p>(including investment property)</p> <p>For each give description, address, value, location of title deeds, whether solely owned, joint tenancy or tenancy in common – and with whom</p>				
<p>Bank Accounts</p> <p>List accounts, branch, and value</p>				

ASSET	DETAILS	OWNER	VALUE
Personal Property (other than every day items)			
Shares/Bonds			
Debentures and mortgages			
Life Insurance Policy*			
	*Have you nominated a beneficiary? If so whom:		
Superannuation*			
	*Have you nominated a beneficiary? If so whom:		
Interest In Partnership Or Business? If so, provide details			
Any other assets (eg furniture, tools etc			
Motor vehicles(s)			
Any medical or hospital contribution fund?			
Is there any money owed to you?			
Is there any property that you may inherit?			
Any disputed debts or further debts?			
Do you own any overseas assets? If so, provide details			
6. YOUR LIABILITIES	DETAILS	OWNER	AMOUNT
Mortgages			
Personal loans			

Personal guarantees			
Household bills			
Other debts – please specify			
7. DISCHARGE OF LIABILITIES			
<ul style="list-style-type: none"> ▪ If any property is subject to a secured debt (eg a mortgage), is property to be given free of the debt or subject to it? ▪ Are any particular assets to be set aside to pay liabilities (eg funeral and administrative expenses)? If so, list them. 			
8. EXECUTORS Who do you want to be the Executor(s) of your will?		<p>The Executor is responsible for carrying out your wishes as set out in your will. The Executor can also be a beneficiary. You should appoint someone that you trust who is familiar with your affairs.</p> <p>It is preferable that you nominate more than one executors or a second choice in case your first choice dies before you or is not able or willing to act. Your Executors can act jointly, or one can act if the other is unable or unwilling or has predeceased the testator.</p> <p>Where there is a sole beneficiary, however, only that person need be Executor, although a substitute Executor should be designated together with any substitutional gift</p>	
		EXECUTOR 1	EXECUTOR 2
Full name Address Occupation Relationship to you Age Has the Executor been asked to be Executor? Are the Executors to act jointly or alternatively?			
9. PRIMARY BENEFICIARIES Who do you want your assets to go to? List any assets you wish to leave as specific gifts to specific beneficiaries.		Broadly, under the Family Provision Act, any person who has been wholly or partially dependant on you and was a member of your household who feels they have not been adequately provided for in your Will can make a claim against your estate. If you feel that there may be potential claimants to your estate please discuss this with your solicitor.	
		BENEFICIARY 1	BENEFICIARY 2
Full name Address Occupation Relationship to you Date of birth, Age			

<p>What is to be given to the beneficiary? If a specific gift, describe in detail.</p> <p>Is the gift to be subject to reaching a certain age or meeting some other contingency (eg reaching age 25 or marrying earlier?)</p> <p>Is the gift to be limited to the beneficiaries lifetime (or some lesser period) or is it to be an absolute gift?</p> <p>If the gift is to be shared between beneficiaries; are they to take as joint tenants or tenants in common?</p>		
	BENEFICIARY 3	BENEFICIARY 4
<p>Full name</p> <p>Address</p> <p>Occupation</p> <p>Relationship to you</p> <p>Date of birth, Age</p> <p>What is to be given to the beneficiary? If a specific gift, describe in detail.</p> <p>Is the gift to be subject to reaching a certain age or some other contingency (eg reaching age 25 or marrying earlier?)</p> <p>Is the gift to be limited to the beneficiaries lifetime (or some lesser period) or is it to be an absolute gift?</p>		
<p>If the gift is to be shared between beneficiaries; are they to take as joint tenants or tenants in common?</p>		
<p>10. Do you wish to leave all your assets (after the specific gifts) to your spouse?</p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No, I want to leave my assets as set out in these instructions</p>	
<p>11. If your spouse dies before you, do you wish to leave your assets to your children in equal shares?</p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No, I want to leave my assets as set out in these instructions</p>	
<p>12. If your spouse and more or one of your children die before you, do you want the share that would have been given to your deceased child to go instead to his or her children equally?</p>	<p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No, I want to leave my assets as set out in these instructions (see substitutional gifts)</p>	
<p>13. If you do not wish to leave your assets as set out above, then whom do you wish to leave your assets?</p>		

<p>14. SUBSTITUTIONAL GIFTS</p> <p>For <u>each</u> substitutional gift list the following:</p>	<p>In the event that a beneficiary predeceases the testator or dies before meeting a contingency, is the estate to go to (1) Existing beneficiaries, (2) Children of deceased beneficiaries, or (3) Someone else:</p>	
<p>Name of original beneficiary</p> <p>Name of substitutional beneficiary</p> <p>Address</p> <p>Relationship to you</p> <p>Date of Birth, Age</p> <p>Gift</p> <p>Is there any contingency on substitutional gift (eg reaching a certain age or marrying earlier)?</p>		
<p>15. INFANT BENEFICIARIES</p>		
<p>Are any of the beneficiaries under 18?</p> <p>Is so, what are the names of infant beneficiaries?</p> <p>Is gift to vest in interest immediately or to be contingent? If contingent, what is the contingency?</p> <p>At what age do you want beneficiary to take their inheritance?</p>		
<p>16. EXCLUSION</p>	<p>Is there anyone in the your family to be specifically excluded from the estate? If so, list:</p>	
<p>Name</p> <p>Relationship to testator</p> <p>What is the reason for the exclusion:</p>		
<p>17. GUARDIANS</p>	<p>Who do you wish to appoint as guardian (or guardians) of your infant children? (This question need only be answered if you have any minor children).</p>	
<p>Name(s)</p> <p>Address(es)</p> <p>Age</p> <p>Occupation</p> <p>Relationship to testator</p>		

Have the guardian(s) been asked to be guardian?		
18. POWERS OF EXECUTORS		
If any property is to be held on trust for any time, please give consideration to the following questions:	<ul style="list-style-type: none"> ▪ Are the executors to be allowed to choose freely how the property is to be invested during this time? ▪ Are the executors to be allowed to advance funds to beneficiaries out of their shares of the income and/or capital of the gift? ▪ Are the executors to take account of any funds advanced when finally distributing the whole of the estate? ▪ Are the executors allowed to sell assets of the estate? 	
19. DISPOSAL OF BODY		
<p>Do you have any special instructions (eg burial, cremation)?</p> <p>Do you have a prepaid funeral fund? (if so, what is the name of fund)</p>		
20. OTHER INSTRUCTIONS		
Do you wish to allow your body to be available for organ donation?		
Do you wish to allow your body to be available for medical research?		
Are there any other instructions?		
<p>CAN YOU COME TO EXECUTE THE WILL?</p> <p>ARE WE TO TELEPHONE WHEN WILL BE READY?</p> <p>Signature: Date:</p>		