

INFORMATION FOR WILLS / POWERS OF ATTORNEY

PART A - PERSONAL DETAILS QUESTION 1 YOUR DETAILS Full Name Address D.O.B ☐Mr ☐ Mrs ☐ Ms ☐ Miss 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 D.O.B Address ☐Mr ☐ Mrs ☐ Ms ☐ Miss Home phone number Mobile phone number Work phone number Email: Occupation:

Address for correspondence:

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

Full Name	Address		D.O.B	Relationship (if not a biological child)
	I			
QUESTION 3 (IF YOU DO NOT	HAVE ANY DEPENDANTS PRO	CEED TO PART E	3)	
OTHER DEPENDANTS			T	
Full Name	Address		D.O.B	Relationship
			1	
PART B - ASSE	T DETAILS			
	E OR "BALL PARK" VALUES AI	RE REQUIRED)		
			TON 5)	
QUESTION 4 (IF YOU DO NOT		: :		
•				
REAL ESTATE		☐ Sole	☐ Joint	☐ Tenants in common
REAL ESTATE Your main residence		☐ Sole	_	
REAL ESTATE Your main residence	Owner	☐ Sole	☐ Joint	☐ Tenants in common Mortgage
QUESTION 4 (IF YOU DO NOT REAL ESTATE Your main residence Full Address		☐ Sole	_	

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:	1				
Use (eg holiday home or rental)					
QUESTION 5					
CASH, CHEQUE AND DEPOSIT ACCOUN	TS				
Institution	Name on account			Current balance	
				\$	
					\$
					\$
QUESTION 6 (IF YOU DO NOT HAVE ANY SHARES AND OTHER INVESTMENTS	SHARES O	R OTHER INVI	ESTMENTS	PROCEED TO QUE	STION 7)
Name of Company	Number	of shares	In whose n	ame is it held?	Value
					\$
					\$
					\$
Other Investments:	In whose	e name is it held	i?		Value
					\$
					\$
					\$

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

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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

Have any binding death ben	efit nomination	s been made] Yes (if yes please	provide a	сору)
QUESTION 11 (IF YOU DO NOT HA	VE ANY LIFE	INSURANCE P	ROCEED TO	QUESTION 12)		
ASSETS – LIFE INSURANCE Life insurance company	In whose n	ame is the polic	y held	Who will be the be	eneficiary	Value
				. ,		\$
						\$
						\$
IF YOU DO NOT HAVE A SELF MAN PROCEED TO QUESTION 14) QUESTION 12 (IF YOU DO NOT HAD SELF MANAGED SUPERANNUATION Are there any existing SMSFs? No (proceed to the next question Yes if yes, please bring to your apple A copy of the trust deed Any deeds of variation to the Any binding death benefit not the Interest of	VE A SELF MADON FUNDS (SION) opointment: e trust deed or ominations	ANAGED SUPE MSF) any changes of	RANNUATIO	ON FUND PROCEE		
Name of SMSF		Trustee(s)			Directo	or(s) (if applicable)
Member name	Approximate balance	account	(BDBN) r			ance in SMSF?
			☐ Yes ☐			Yes No
			Yes			Yes No
			Yes			Yes No
			☐ Yes ☐	_ No		Yes 🗌 No

QUESTION 13 (IF YOU DO NOT HAVE AN INTERE YOU MAY USE PART E TO MAKE ANY ADDITION		PROCEED TO QUESTION 14) NOTE:
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 tru	st)	
Name of Trust	Appointor(s)	Trustee(s)
Do you have any special wishes in relation to the tru	ıst? ☐ Yes (if yes, fill in details below)	□ No
Are there any unpaid present entitlements/benef	iciary loans?	
Are there any family companies? Yes (if yes, to	III In details below)	
Company name:		
Directors:		
Shareholdings:		
Do you have any specific wishes in relation to the sh	nares? Yes (if yes, fill in details below	v) 🗆 No
Are any of your assets active business assets or small business concessions)	do you own or control entities that co	ontrol active business assets? (CGT
☐ Yes (provide details):		

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
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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):
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)
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ADDITIONAL PERSONAL QUESTION
QUESTION 17 (IF YOU DO NOT HAVE ANY FROZEN HUMAN OR REPRODUCTIVE TISSUE PROCEED TO QUESTION 18)
FROZEN HUMAN OR REPRODUCTIVE TISSUE
Are you participating in an IVF program?
The you participating in an rive program:

Do you have, or is it possible that you will have in the future, frozen eggs, sperm or embryos?
If yes, do you consent to these being used by your partner after your death and/or do you consent to them being used by any other person?
Have you entered into any agreement with the facility storing these things or with the administrator of an IVF program which governs any of the issues referred to above?

QUESTION 18 (IF YOU DO NOT HAVE ANY DIGITAL ASSETS PROCEED TO PART C)

DIGITAL ASSETS

Digital assets include any item or text or media which is stored in a digital format, over which a person has rights.

This can include:

- Social media accounts (i.e. Facebook, Instagram, Twitter);
- Online accounts including banking;
- Financial assets such as cryptocurrency;
- Cloud storage accounts.

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

- What are the digital assets you hold or own?
- Where are the digital assets held or stored?
- How can the digital assets be accessed including what are the usernames?
- If passwords are required to access the digital assets, where are the passwords stored or how can they be accessed or found?
- Do you have two factor authentication required for access to digital assets and if so, what is the two factor authentication device/app?
- Is there a contact person or company that is responsible for managing/storing the digital assets?
- What is to happen to the digital assets? For example:
 - Facebook/Instagram account: Notify Facebook and have the account memorialised.

- o Photographs on iCloud: Copies of photographs to spouse and children, account then closed.
- o PayPal: Account to be closed and any remaining funds to form part of residuary estate.
- Other personal online accounts: All accounts to be closed.

☐ Yes (provide details):	
□No	
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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	

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

DETAILS, ASSET STRUCTURE OR WISHES IN RELATION TO YOUR WILL (S) AND/C ATTORNEY.	DR ENDURING POWERS OF