



INSTRUCTIONS FOR BASIC WILL

Date:

Personal Particulars

Title:

Full Name (as per ID):

Assets in any other name/s or different spelling:

Date of Birth:/...../.....

Place of Birth:

If not born in Australia, date of arrival:

Address:

Occupation:

Telephone: Home: Work: Mobile:

Email:

Issues re capacity to give instructions: Yes/No

Previous Will

Have you previously made a Will? Yes/No

If yes, where is it held?

If yes, what were terms?

Marriage/s, spouse/s, de facto, children/other dependents/relevant family members

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Proposed Executor/s

NB: Duties of the Executor/Executrix include applying for Probate (if necessary) and administering the Estate as per the Will

Title:
Full Name (as per ID):
Address:
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Occupation:
Relationship:

Alternate/Joint Executor/s:

Title:
Full Name (as per ID):
Known by any other name/s:
Address:
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Occupation:
Relationship:

Assets

Real property:
Title particulars & location:
Any encumbrances:
Joint ownership/tenants in common?

Real property:
Title particulars & location:
Any encumbrances:
Joint proprietors/tenants in common?

Real property:
Title particulars & location:
Any encumbrances:
Joint ownership/tenants in common?



Family companies/trusts:

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Shares:

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Superannuation Fund:

Death Benefit Nomination: Yes/No

Cash/cash investments:

Interstate and foreign assets:

Personal items/specific bequests:

Debts/Liabilities

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Guardianship

Are the trustees/executors to be guardians of the infant children jointly with the wife or husband – or alone where the other parent has predeceased?

Beneficiaries/Distribution of Estate

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Funeral wishes

Any particular wishes regarding:

- Cremation/burial
- Expenditure on tombstone
- Maintenance of grave, etc.
- Overseas Repatriation