



ESTATE PLANNING

WILLS & POWERS OF ATTORNEY

ORDER FORMS



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ESTATE PLANNING - ORDER FORM

NOTE: The most important Clauses requiring completion are indicated with asterisks.

1. Names of Person(s) making Will/Power of Attorney**

PERSON 1

Full Name _____

Address _____

Suburb _____

State _____

Postcode _____

Occupation _____

Email Address _____

PERSON 2 (if applicable, i.e. spouse)

Relationship to Person 1 _____

Full Name _____

Address _____

Suburb _____

State _____

Postcode _____

Occupation _____

Email Address _____

OR Date of any Impending Marriage
(relevant for Wills only) * _____

OR Date of any Impending Separation * _____

2. Documents Required (please tick)

WILL(S) Please complete sections 3-12

Do you wish to establish a testamentary trust in your Will/s? ** Yes No

POWER(S) OF ATTORNEY Please complete section 13

3. Who will be the Executor and Trustee ('administrator' of the Will)? **

(For couples, assuming each other first, then the backup is below)

Full Name _____

Address _____

Suburb _____

State _____

Postcode _____

4. Do you have any specific Items (jewellery, antiques etc) to leave to Specific Beneficiaries? **

Item	Beneficiary	Age/Condition
_____	_____	_____
_____	_____	_____
_____	_____	_____

5. To whom would you like to leave the Remainder of the Estate (usually to children, parents, charities etc)? **

Sole Beneficiary (first choice – i.e. partner, parent):

Full Name: _____
 Relationship (i.e. Partner, wife, son) _____
 Address: _____

 Suburb _____ State _____ Postcode _____

Next choice (in case of sole beneficiary being unable to receive proceeds of estate. Usually children, nieces/nephews etc):

Beneficiary	Share/Portion
_____	_____
_____	_____
_____	_____

Unless you nominate otherwise we will assume any minors are to fully take their entitlement at 23 years of age.

6. Backup Beneficiaries

In case of an interest failing to vest, backup beneficiaries (usually relatives outside family nucleus, close friends etc): -

Beneficiary	Share/portion
_____	_____
_____	_____
_____	_____

If a beneficiary predeceases you, does that beneficiary’s share go to their children, or partner? Or will the Estate simply be distributed to living beneficiaries only?

Is the beneficiary under the age of eighteen (18) years? Yes No

Have you lent money or given a gift to any beneficiary which is to be taken into account when the estate is distributed? Yes No

If yes, give details: _____

7. Is there anyone other than your spouse or your children whom you have previously supported, currently support or help to support?

Name (1): _____
Address: _____
Relationship: _____
Support given: _____

Name (2): _____
Address: _____
Relationship: _____
Support given: _____

Particulars of previous spouse(s), children, adopted children (either formally or informally adopted), stepchildren and former or current dependents (whether or not you intend to benefit these people).

8. Guardians for children in their minority (assuming both you and spouse deceased) **

Full Name(s) _____
Relationship(s) _____
Address: _____

Suburb _____ State _____ Postcode _____

9. Do You Have A Family Trust? ** Yes No

Name of Family Trust: _____
Name of Trustee: _____
Name of appointor/guardian: _____
Date family trust came into operation: _____
Is the family trust to continue beyond death? _____

I nominate my replacement Appointor/s as follows:

Full Name: _____
Address: _____

Suburb _____ State _____ Postcode _____

10. Do you have a Business?

Do you or your family trust conduct any business? Yes No

If you tick 'yes' we will contact you to discuss.

11. Other special requirements

