

EXECUTORS TRUSTEES:

1. Spouse/partner? YES / NO

2. If not details:

1.(a) (Full Name): _____

(b) (Occupation) _____

(c) Suburb/City. _____

2.(a) (Full Name): _____

(b) (Occupation) _____

(c) Suburb/City. _____

BURIAL DIRECTION: Buried / Cremated

GUARDIANS

(minimum one required, if
any children are under the
age of 16):

1. _____

2. _____

ANY ADDITIONAL INFORMATION

F:\DOCS\PREC\Will form

WILL FORM NOTES

1. Please ensure that you have the correct spelling of all names and include middle names.
2. You do not have to complete the Specific Item section if you simply want to divide items equally amongst your children or give them to your spouse.
3. If you are appointing your spouse as an Executor please also complete details in item 2 under that heading for alternative Executor in the event that you die together or your spouse died before you.
4. If you have excluded any child or spouse from your Will please provide a detailed explanation as to why they are excluded on a separate page as this may have a bearing on the enforcement of your Will.
5. Should you wish to make any other additions not provided for in the form please do so on a separate page and attach it when you return it to our office.
6. Should you wish to make a Life Interest in a property or item of property to a partner with full ownership passing to your children upon their death please also complete details of that on a separate page and we will draft an appropriate clause.
7. Please note that if you have any property that has been transferred into a Family Trust then your Will will not apply to that property. Depending on the wording of your Trust Deed however the Executors of your Will will most likely take over the power to hire and fire Trustees and therefore would control your Trust.
8. It is important therefore you give this careful consideration when selecting your Executors as they may ultimately control your Family Trust.
9. If there is a potential for conflict between children or between children and a step-parent then you may wish to consider appointing a professional as Executor.
10. Do not hesitate to ask any questions you have about your new Will.
11. Circumstances which may affect how you set out your Will could include:
 - (a) Entering into a marriage/civil union/de facto relationship;
 - (b) Entering into a marriage/civil union/de facto relationship when you and/or your partner has children from a previous relationship;
 - (c) The end of a marriage/civil union/de facto relationship;
 - (d) The purchasing or obtaining of a major asset, for example company shares, expensive art, jewellery and the like;
 - (e) The addition of children or grandchildren to your family;
 - (f) The creation of a Family Trust or company or an existing Family Trust or company;
 - (g) A party named in your Will, for example if the executor, trustee or beneficiary has passed away;
 - (h) You have purchased/obtained overseas assets.