

Wills Preliminary Information Form

This form is designed to assist you in providing required information and considering some of issues that need to be taken into account when preparing your Will. It is suggested that you provided a copy to your attorney prior to conferring with him or her.

Client Name:		
Address:		
Telephone:	H	W
	M	F
Email:		

To make the most of the time during interview it would help if you could provide the following details:

Who is the Will for? (If more than one) – What is the relationship between you (Married? Domestic Partners?)	Myself. Domestic partners (full name name of partner):
Language of choice	<input type="checkbox"/> English <input type="checkbox"/> Other _____ <input type="checkbox"/> Interpreter ?
Your date of birth	/ /
Who will be attending the interview? Just you or will someone else be coming with you?	<input type="checkbox"/> Client(s) only <input type="checkbox"/> Others as well, being –
Have you made a Will previously? Do you have superannuation? If Industry Fund If Self-managed Fund Have you signed any nomination forms with the super fund saying where the benefit is to be paid?	<input type="checkbox"/> No <input type="checkbox"/> Yes – Please bring a copy of your past Will(s) if you have them. Also any Codicil if you have made one <input type="checkbox"/> No <input type="checkbox"/> Yes - <input type="checkbox"/> Industry Fund? <input type="checkbox"/> Self-managed Fund? <input type="checkbox"/> Please bring a copy of the latest Statement of Benefit from the Fund. If you don't have one, ask the Fund to send you one. <input type="checkbox"/> Please bring a copy of the last Balance Sheet and Trust Deed and any variations <input type="checkbox"/> No <input type="checkbox"/> Yes – Please bring a copy of the nomination form if you have one

Has the Family Court made any orders about your property or your ex-spouses property (including your super or your ex-spouses super?)	<input type="checkbox"/> No <input type="checkbox"/> Yes – Please bring of the Orders if you have them
Do you have a pre-nuptial or financial agreement?	<input type="checkbox"/> No <input type="checkbox"/> Yes – Please bring a copy of the document
Do you have your own private company or business?	<input type="checkbox"/> No <input type="checkbox"/> Yes – Please bring in a copy of: - the constitution - the last 2 balance sheets
Do you have a Family Trust?	<input type="checkbox"/> No <input type="checkbox"/> Yes – Please bring in a copy of: - the Trust Deed - any variations to the Trust Deed - the last 2 balance sheets - any deed of nomination (appointors)

Fees for the preparation of your Will(s) are usually based on time and complexity. You should discuss the matter of fees with your attorney.

All additional work such as where clients have existing Family Trusts, businesses, self-managed superannuation funds or where detailed discussions are necessary to weigh up competing priorities on the Estate, for example where there is an extended family through two or more marriages, all involve more time for which additional fees may be charged.

It may be prudent to consider the preparation of various Powers of Attorney or Living Wills at the same time. That may take an extra hour in office time.

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Other questions you will need to consider -

1. Who will you appoint as Executor or Executrix for your will? Do you need joint executors?
2. Do you want to appoint an alternative Executor or Executrix? Who would this be?
3. What is/are the full names, addresses and occupations of your intended Executor/Executors?
4. Do you wish to give specific property to specific persons and if so, can that property be unambiguously described or specified?
5. Do you need to consider estate planning? For example, do you -
 - want to pass on a family business;
 - have a superannuation payout;
 - want to make a gift to a charity;
 - have capital losses;
 - have property which may be caught by capital gains tax i.e. it was purchased before 19 September 1985;
 - have life insurance;
 - have family debts; or
 - want flexibility in distributing your assets, for example, there are more kids on the horizon or for tax purposes?
6. If you are establishing a testamentary trust, have you decided on a suitable trustee(s)?
7. Who will be your beneficiaries? What are their full names and addresses?
8. How will your estate be shared among these beneficiaries? Equally? Fractionally?
9. Are any of your intended beneficiaries minors?
10. Who will you nominate as residuary beneficiary or beneficiaries, if the main beneficiaries die?
11. Are there any other dependents and have you made adequate provision in your Will for them?
12. Do you want to appoint a guardian for your children whilst they are minors? Who will this be? What is their full name and address?
13. Do you want to give other directions, such as whether you would like to be buried or cremated and where you would like your remains buried?
14. Do you want to arrange and pay for your funeral in advance?
15. Do you wish to specify whether or not you agree to organ and tissue transplantation?
16. Where will you put your Will? Have you told anyone, e.g. the Executor where it is?
17. Where is the original of your present Will? Have you authorised retrieval of it?
18. Have you made a summary list of your current assets, bank and deposit account numbers?