

## WILLS INSTRUCTIONS SHEET (SINGLE)

Please complete as much of the form as possible:  
For any queries please contact our dedicated line on **0449 931 831**

All questions contained in this document are strictly confidential.

PERSONAL DETAILS	
1. <b>Full Name:</b> <i>(First, Middle, Last):</i>	<input type="checkbox"/> M <input type="checkbox"/> F
2. <b>DOB:</b>	
3. <b>Residential Address:</b>	4. <b>Email Address:</b>
Phone Number:	
5. <b>Occupation:</b>	6. <b>Do you have a current Will? If so please provide a copy</b> <input type="checkbox"/> Y / <input type="checkbox"/> N
7. <b>Do you want to include a clause in your will stating who you leave your digital assets to and who you leave control of you digital accounts (e.g. email, Facebook) to?</b>	<input type="checkbox"/> Y / <input type="checkbox"/> N
8. <b>If you answered yes to question (7) please state that person's full name, address and their relationship to you:</b>	

AFTER DEATH WISHES	
9. <b>Would you like to be buried or cremated? Or do you have no preference</b>	<input type="radio"/> Buried <input type="radio"/> Cremated <input type="radio"/> No preference
10. <b>If you die overseas, is it important to you that your body is brought back to Australia?</b>	<input type="checkbox"/> Y / <input type="checkbox"/> N
11. <b>Do you want your body to be available to be used for medical purposes after your death?</b>	<input type="checkbox"/> Y / <input type="checkbox"/> N
12. <b>Is there a particular place you would like to be buried or have your ashes scattered? If so, please specify?</b>	<input type="checkbox"/> Y / <input type="checkbox"/> N

**FAMILY DETAILS**

**13. Are you married?**

Y /  N

**14. Are you in a de facto relationship?**

Y /  N

**15. If you answered yes to questions (13 or 14)**

**What is your partner's full name?**

**16. If you answered yes to question 14 do you think you might one day marry your partner?**

Y /  N

**17. If you answered yes to questions (13 or 14)**

**Please state the duration of your relationship and describe its financial arrangements (that is, whether your partner has helped you establish your career or build your wealth or vice versa).**

**18. Do you have any children?**

Y /  N

**19. If you answered yes to question (17) please state these children's full names and dates of birth (First, Middle, Last) & Address (if the child is not living with you):**

Child #1:	Date of Birth:
Child #2:	Date of Birth:
Child #3:	Date of Birth:
Child #4:	Date of Birth:

**20. At what age would you want your children or your lineal descendants (eg, grandchildren) to inherit any money left to them under your will?**

18  
 21  
 25  
 Other

21. Have you previously been married to anyone else?

Y /  N

If so, please provide details of the full name of your former spouse(s), the duration of this marriage(s), its financial arrangements (that is, any property settlement, and whether that person helped you build your wealth or vice versa) and the names and dates of birth of any children of this marriage.

**PLEASE NOTE:** For the remainder of this questionnaire, reference to a 'spouse' includes a de facto partner

22. Is there anyone else who at any time has been wholly or partly dependent on you or that might have a "moral claim" on your estate (such as past partners who made significant contributions towards your wealth or who you cared for)?

If yes, please provide details (including the duration of your relationship, their financial resources, their age, any disabilities, whether they supported you at any time, and any gifts or benefits you have previously given them).

Y /  N

23. Do you have a child with a disability for whom special arrangements are needed in your Will?

Y /  N

24. Do you have a child who is having serious relationship problems with his/her spouse/partner, to the point where you are concerned that they might separate?

Y /  N

25. Do you have a child whom you want to exclude from your Will or give a much smaller share of your estate than your other children?

Y /  N

26. Do you have a child who has serious problems handling money and who you would not want having direct access to the assets in your estate?

Y /  N

27. If you have answered yes to any of the last 4 questions, please provide details:

28. Have you entered into a Binding Financial Agreement?  Y /  N

so, please give details:-

#### YOUR EXECUTOR

Here, you must name someone to be responsible for administering your estate when you die. This person is called your executor and will, among other things, be responsible for paying off your debts and taxes and distributing your remaining assets in accordance with your wishes.

The person needs to be willing to act, not too old, within Australia and appropriately skilled (particularly if you require them to make investment decisions).

If you would like Conatur Legal to be your executor or substitute executor, we are required to inform you we would charge for our services as executor. Typically people name their partner as executor, plus a backup executor.

You can appoint more than one primary Executors to act jointly if you prefer (they should be people who are able to work together). How many primary Executors would you like?

1 /  2

29. Full Name of Primary Executor(s): *(First, Middle, Last):*

30. Relationship of Primary Executor(s) to you:

31. Residential Address of Primary Executor(s):

<p><b>32. Full Name of Secondary Executor: (First, Middle, Last):</b></p>	<p><b>33. Relationship of Secondary Executor to you:</b></p>
<p><b>34. Residential Address of Secondary Executor:</b></p>	

**REAL ESTATE**

**35. Do you own Real Estate?**

Y /  N

**36. If you answered yes to question (35) what is the address / addresses of the property / properties?**

**If you answered no to question (35) please proceed directly to question (39)**

**37. Do you own this property / properties as joint tenant with anyone else?**

NB: if you own the property as joint tenants, the property will automatically go to the other joint tenant when you die.

Y /  N /  Don't Know

**38. Do you want to leave this property to someone different to the person you will leave the residue of your estate to? \***

Y /  N

**If yes, please describe who you would like your properties left to:**

**CASH GIFTS**

**39. Do you wish to make a cash gift to an individual (not a charity)? If you answered no to question (39) please proceed directly to question (43)**

Y /  N

**40. If yes, how many gifts do you want to give to individuals?**

- 1
- 2
- 3
- Other, please specify:

**41. What are the full names of the beneficiary, their relationship to you and the amounts you wish to gift to them?**

**42. If any of these beneficiaries die before you or shortly (i.e. 30 days) after you, then \***

The cash gift will not be made /  The cash gift will be made to an alternate beneficiary

full names of the alternate beneficiary and their relationship to you

**43. Do you wish to make a cash gift to an individual (not a charity)? If you answered no to question (43) please proceed directly to question (43)**

Y /  N

**44. What are the full names of the charities and the amounts you wish to gift to them?**

**45. If any of these charities do not exist at the time of your death, then:**

- Your charitable gift will not be made
- Your executor may make this gift to another charitable or community organization that carries on similar work for the benefit of a similar group of people

**PERSONAL GIFTS**

You don't have to make any gift of personal property to a beneficiary. If you do not, then your personal property becomes part of the residue of your estate, which you can transfer or divide among your residuary beneficiaries.

**46. Do you wish to make a personal gift to an individual?**

Y /  N

**47. If yes, how many gifts of personal property do you want to give to individuals?**

- 1
- 2
- 3
- Other, please specify:

**48. What are the full names of the beneficiaries, their relationship to you, their addresses, and the personal property that you want to leave them?**

**COMPLEX ASSETS**

**49. Do you want to leave a gift of specific shares in a company or other securities to someone in your Will? Disregard shares that may pass as part of a general gift of or from your estate. If so, please provide details.**

Y /  N

**50. Do you control a family company or have shares in any private (non-listed) company that may need special consideration in your Will? Eg a company that may have pre-emptive rights or other restrictions on the transfer of shares in its constitution. This could include the trustee company of a family trust or self managed superannuation fund. If so, please provide details.**

Y /  N

**51. Do you control a family trust or have units in any private (non-listed) unit trust that may need special consideration in your Will? Eg a trust that may have pre-emptive rights or other restrictions on the transfer of units in the trust deed. If so, please provide details.**

Y /  N

**52. Do you have an interest as a partner in a partnership that may need special consideration in your Will? E.g a partnership that may have pre-emptive rights or other restrictions on the transfer of partnership interests in the partnership agreement. If so, please provide details.**

Y /  N

**53. Do you own substantial assets, especially real estate, outside Australia? If so, please provide details.**

Y /  N



**54. Are you subject to any agreement or court order that restricts your ability to transfer your assets or that could otherwise affect the distribution of your estate? e.g. a binding financial agreement under the Family Law Act or a mutual will agreement. If so, please provide details.**

Y /  N

**55. Did you want to leave anyone a 'life interest' in any real estate (ie a right to live in a house while they are alive with full ownership of the house passing automatically to someone else when they die)? If so, please provide details. \***

#### RESIDUE OF ESTATE

The residue of your estate is all of the leftover assets that are available to be transferred or distributed to your beneficiaries after all funeral and testamentary expenses, taxes, and debts have been paid and specific gifts to beneficiaries (identified above) have been made.

**56. What would you like your Executor to do with the residue of your estate? \***

- Transfer and pay out the residue of your estate to your spouse
- Invest the residue of your estate in trust for your spouse's benefit and pay out income and capital from that trust to your spouse during your spouse's lifetime
- Divide the residue of your estate equally among your children
- Transfer and pay out the residue of your estate to one beneficiary
- Divide the residue of your estate among multiple beneficiaries.

**Please provide some details as to your wishes (e.g names of the beneficiaries, addresses, relationship to you)**

**If yes, do either of you have anyone who you would like specifically excluded from your Will? (If yes provide details)**

Y /  N

**GUARDIAN**

Here you can name a legal representative to be responsible for your minor children and their property when you pass away. Unless you say otherwise, the appointment of this legal representative only takes effect upon the death of the last surviving parent of your minor child.

If you do not have children please proceed to the end of the questionnaire.

**57. Are your children under the age of 18?**

Y /  N

**58. Do you want to name a guardian of your minor children?**

Y /  N

**59. If yes, what are the full names of the proposed guardian, their relationship to you and their address?**

**60. Do you want someone other than the person you appointed as substitute executor to be in charge of your children's property until they become adults?**

Y /  N

**61. If so, please state the name of the person you would like to appoint as the trustee of your children's property, their address and their relationship to you.**

**By signing below you intend these instructions to be your Wills for the time being until execution of your formal Wills (noting that you will provide any additional instructions required promptly and that you will sign your Wills as soon as possible after receipt)**

**Our recommendation is that this instruction sheet in printed and signed by hand, and signed back to our Firm. However, where this is not possible you may elect to sign electronically.**

**Please send this form to [wills@conatur.com.au](mailto:wills@conatur.com.au) and we will respond to you shortly**

**Signature**

**Print Name**

**Date:**