

WILL QUESTIONNAIRE

Please complete this questionnaire to assist us with preparation of your Will. **The information required is specific to the individual Will maker** (i.e. if you are making your Will in conjunction with your Spouse/Partner they will also need to complete their own questionnaire).

Refer to the Glossary of Terms on the last page should you require clarification on the terms used in the questionnaire.

Personal Information

	Will maker	Spouse/Partner
Full Name		
Other names you have been known by		
Date of birth		
Occupation		
Address		
Any health concerns		
Relationship status (tick one)	<input type="checkbox"/> Married <input type="checkbox"/> Engaged <input type="checkbox"/> De facto/living with a partner <input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Other (please specify)	<input type="checkbox"/> Married <input type="checkbox"/> Engaged <input type="checkbox"/> De facto/living with a partner <input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Other (please specify)
Do you have any existing relationship property agreements?		

Children

Please provide details for your children, including any step-children and adopted children:

Name	Address	Occupation	Date of birth	Child, step-child or adopted

Please provide details of the person(s) you would like to appoint as Guardian of your children if they are not yet 18 years of age:

Full Name	
Address	
Occupation	
Relationship to you	

Full Name	
Address	
Occupation	
Relationship to you	

Would you like to include a Letter of Wishes to your Guardian(s) for the children?

Yes

No

Note, a Letter of Wishes is not legally binding but can be legally persuasive.

Executor

Please provide details of the person(s) you would like to be Executor of your estate:

Full Name	
Address	
Occupation	
Relationship to you	

Full Name	
Address	
Occupation	
Relationship to you	

Replacement executor if one or both of the above are unable or unwilling to act:

Full Name	
Address	
Occupation	
Relationship to you	

Property

Please provide details of any real estate you own:

Address	Details of any mortgages	Ownership (jointly/solely)

Any real estate you own as a joint tenant with another person(s) will automatically transfer to the surviving owner(s) when you die. If you do not want this to happen, please get in touch with us to discuss.

Please provide details of any overseas assets you own:

Asset	Country	Value	To be covered in this will?

Domain Names, Websites, Email Accounts, Social Media Accounts

If you wish to, you can list all of the log in details and password for relevant online accounts. We can seal them in an envelope to be held with your will.

Would you like us to attach these to your Will in an envelope?

Yes

No

Gifts/Legacies

Do you wish to make any specific gifts of money or personal items (vehicles, jewellery, antiques, etc)? The recipient can be an individual or charitable organisation. You can specify an alternative beneficiary, which means if that person dies before you, the gift can go to somebody else. Please be as specific as possible with your description of the item.

Gift description	
Beneficiary full name	
Address	
Occupation	
Relationship to you	
Alternative beneficiary	

Gift description	
Beneficiary full name	
Address	
Occupation	
Relationship to you	
Alternative beneficiary	

Beneficiaries – Residue of your estate

Who do you wish to receive your residual estate after your debts have been paid and specific gifts made? You can specify an alternative beneficiary, which means if that person dies before you, their share can go to somebody else.

If you have a Family Trust, do you want your residuary estate to pass to the Trust? Yes
 No

If you answered 'No' to the above question, do you want to leave the residue first to your spouse/civil partner/de facto partner? Yes
 No

If your spouse/civil partner/de facto partner dies before you, or if you answered no to the above question, do you want to leave the residue to your children?

- Yes, in equal shares
- Yes, in unequal shares (please provide details below)
- No
- I do not have children

Name	Address & Occupation	Age to inherit (if applicable)	Share (% or fraction)

If you want to leave the residue (or part of the residue) to your child and that child dies leaving children of their own, would you like the share to pass down to their children? Yes
 No

If you are not leaving the residue to a partner or children, do you want to leave the residue to particular people and/or charities? Yes
 No

Name	Address & Occupation	Relationship to you	Age to inherit (if applicable)	Share (% or fraction)

Remains and Burial Instructions

Please advise if you have any special requests for your funeral, such as burial or cremation:

Would you like your body to be available for medical purposes after your death, if possible? Yes
 No

Trusts

This section only applies if you have an interest in a trust, such as settlor, trustee or beneficiary. Please provide details of any trust you have an interest in:

Name of trust	Date created	Interest (i.e. settlor/trustee/beneficiary)

Do you wish to forgive any debts the trust owes to you on your death? Yes No

If you have the Power of Appointment under the trust, do you want to give someone this power on your death? Yes No

Glossary of Terms

Beneficiary	An individual, entity or organisation chosen to benefit in some way under the provisions of your Will
Executor	The person named in your Will to administer your estate, i.e. collect assets, pay debts and distribute the balance of your estate in accordance with your Will
Gift over	If a specific beneficiary dies or otherwise fails to take the benefit intended, then that persons' child(ren) or someone else receives the benefit instead
Guardian	The person(s) who have custody and control of the property of minor children until they reach 18 years of age. The roles of custody and control do not need to be held by the same person(s). The person you appoint as Guardian does not have day-to-day care of your child(ren)
Residual Estate	Everything owned by you after all specific gifts have been distributed and debts and funeral expenses met
