

## WILL & ESTATE PLAN - INSTRUCTION SHEET

### Your Personal Details

Full name:				
Street address:				
Postal address (if different):				
Phone number:				
Email:				
Occupation:				
Australian citizen:	Yes	No		
Marital status:	Single	Married	De-facto	Divorced

### Your Spouse's Details (if any)

Full name:				
Street address:				
Occupation:				
Australian citizen:	Yes	No		

### Your Children's Details (if any)

1	Full name:				
	Street address:				
	Age:				
	Marital status: (if any)	Single	Married	De-facto	Divorced
	Do they have children?	Yes	No		
	Occupation: (if any)				
2	Full name:				
	Street address:				
	Age:				
	Marital status: (if any)	Single	Married	De-facto	Divorced
	Do they have children?	Yes	No		
	Occupation: (if any)				

3	Full name:				
	Street address:				
	Age:				
	Marital status: (if any)	Single	Married	De-facto	Divorced
	Do they have children?	Yes	No		
	Occupation: (if any)				

### Your Assets & Entities That You Control (if any)

#### Family Trust (if any)

Name of Trust:					
Trustee:	You	You & spouse			
	Other (name)				
Appointor:	You	You & spouse			
	Other (name)				
Guardian:	You	You & spouse			
	Other (name)				
Who do you wish to control the trust	Spouse				
	Children and if so	All of them or	1	2	3
	Other (name)				

#### Company (if any)

Name of Company					
Directors	You	You & spouse			
	Other (name)				
Shareholders	You	You & spouse			
	Other (name)				
Who do you wish to control the company	Spouse				
	Children and if so	All of them or	1	2	3
	Other (name)				

**SMSF (if any)**

Name of Fund						
Trustees	You	You & spouse				
	Other (name)					
Intended recipient of your death benefits	Spouse					
	Children and if so	All of them or	1	2	3	
	Your estate					

**Real Property**

1	Address					
	Solely or Jointly	Solely	Jointly			
2	Additional Properties					

**Life Insurance**

Insurer:	
Insured:	
Owner/Recipient:	

**Other**

Asset Details	
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**Your Intended Will**

<b>Who will be your Executor(s)?</b>	Spouse					
	Children	and if so	All of them or	1	2	3
	Other(s)	Full name				
Address						

<b>Who will be your Substitute Executor(s)?</b>	Children					and if so	All of them or	1	2	3
	Other(s)	Full name								
		Address								

<b>Who will be Guardian of your minor children? (if any)</b>	Full name				
	Address				

<b>Specific Gifts</b>	1	Asset details				
		Intended Recipient				
	2	Asset details				
		Intended Recipient				
	3	Asset details				
		Intended Recipient				

<b>Superannuation (if paid to estate)</b>	Spouse					
	Children	and if so	All of them or	1	2	3
	Other	Full name				
Address						

<b>Life Insurance (if paid to estate)</b>	Spouse					
	Children	and if so	All of them or	1	2	3
	Other	Full name				
Address						

<b>Residue of Your Estate</b>	1st Instance	Spouse and if so absolutely testamentary trust	
		Children equally and if so absolutely testamentary trust	
		Other (details)	
	2nd Instance	Spouse and if so absolutely testamentary trust	
		Children equally and if so absolutely testamentary trust	
		Other (details)	

<p><b>Do you have any additional testamentary wishes?</b></p>	
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<p>Do you have any beneficiaries that require special attention? (i.e. disabilities of any nature; drug or alcohol dependent; facing potential bankruptcy; family law problems, high-risk occupation; spendthrift). If yes, please provide details.</p>	
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Do you have an <b>Enduring Power of Attorney</b> in place?	Yes	No
Do you have an <b>Enduring Power of Guardianship</b> in place?	Yes	No
Do you have an <b>Advance Health Directive</b> in place?	Yes	No

This instruction sheet provides Perth Probate with some preliminary information necessary to prepare your Will and other documents that may be necessary as part of the estate planning process for you. Do not be concerned that this form does not cover every matter you wish to be included in your Will. Please contact us to discuss any other matters you may want to address.