

GUARDIAN WILLS AND ESTATES

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WILL INFORMATION SHEET - COUPLE

DATE _____ REFERRED BY _____ COMPANY _____

SURNAME _____ FIRST/MIDDLE NAMES _____

DOB _____ MARITAL STATUS _____ OCCUPATION _____

SURNAME _____ FIRST/MIDDLE NAMES _____

DOB _____ OCCUPATION _____

ADDRESS _____

CONTACT DETAILS: HOME _____ BUSINESS _____ FAX _____

MOBILE _____ EMAIL _____

WHO DO YOU WISH TO BE YOUR EXECUTOR?

1st Executor

SURNAME _____ FIRST AND MIDDLE NAMES _____

ADDRESS _____ RELATIONSHIP _____

2nd or Joint Executor

SURNAME _____ FIRST AND MIDDLE NAMES _____

ADDRESS _____ RELATIONSHIP _____

PERSONS TO BENEFIT UNDER THE PROPOSED WILL ARE;-

FULL NAME

ADDRESS

RELATIONSHIP

Persons to benefit under the proposed Will ...continued.

ARE YOU DIVORCED AND HAS PROPERTY SETTLEMENT BEEN FINALISED? **YES - NO**

WHO DO YOU WISH TO APPOINT AS GUARDIAN OF YOUR INFANT CHILDREN?

SURNAME _____ FIRST AND MIDDLE NAMES _____

ADDRESS _____ RELATIONSHIP _____

SURNAME _____ FIRST AND MIDDLE NAMES _____

ADDRESS _____ RELATIONSHIP _____

HAS CLIENT OMITTED PERSONS WHO MAY CLAIM UNDER THE INHERITANCE ACT?

YES - NO IF YES, PLEASE PROVIDE DETAILS

ASSETS

DO YOU HAVE AN INTEREST IN A PARTNERSHIP OR A FAMILY TRUST? YES - NO

IF YES, PLEASE PROVIDE DETAILS

SUPERANNUATION & LIFE INSURANCE DETAILS

TYPE OF FUND _____

Who is the nominated beneficiary? _____ Is this nomination binding **YES – NO**

LIFE INSURANCE DETAILS

COMPANY _____

INSURANCE POLICY NO _____

MANNER IN WHICH ASSETS ARE TO BE DISTRIBUTED

HAVE YOU ANY SPECIAL BEQUESTS THAT YOU WISH TO MAKE IN YOUR WILL

(eg jewellery, motor vehicle)

DO YOU WISH TO INCLUDE THE CLAUSE BELOW – INVESTMENT ADVISOR

IT IS my wish but I do not direct that my Executor seek professional accounting or financial planning advice in the administration of my estate and any costs incurred shall be deemed a testamentary expense

DO YOU WISH TO INCLUDE THE CLAUSE BELOW - GWE

WITHOUT imposing any trust or legally binding obligation I suggest that my Executor consult with Guardian Wills and Estates in the administration of my estate and any costs incurred shall be deemed a testamentary expense

FUNERAL ARRANGEMENTS	HUSBAND/PARTNER	WIFE/PARTNER
DO YOU WISH TO BE BURIED/CREMATED	_____	_____
SPECIFY ANY SPECIAL ARRANGEMENTS – BURIAL _____		
SPECIFY ANY SPECIAL ARRANGEMENTS – CREMATION _____		
RELIGIOUS RITES INSTRUCTIONS	YES/NO	YES/NO

DO YOU WANT AN ENDURING POWER OF ATTORNEY?	YES - NO
SURNAME _____ FIRST & MIDDLE NAMES _____	
ADDRESS _____ RELATIONSHIP _____	
SINGLE _____ JOINT _____ JOINT AND SEVERAL _____	
DO YOU WISH TO NOMINATE A SUBSTITUTE ATTORNEY?	YES - NO
SURNAME _____ FIRST & MIDDLE NAMES _____	
ADDRESS _____ RELATIONSHIP _____	
WHEN DO YOU WISH THE ENDURING POWER OF ATTORNEY TO OPERATE? (From now or Order of The State Administrative Tribunal)	

I STATE THAT

- (i) the instructions written on this information sheet have been given with my full knowledge, approval, and understanding and that no person has exercised any undue influence over me in regard to the making of my Will or Enduring Power of Attorney.
- (ii) the details, including ownership of the assets listed above, are to the best of my knowledge true and correct and I do not wish any further enquiries to be made in relation to those assets.
- (iii) I understand that this is a legally prepared document and that I will be charged _____ for this service.
- (iv) Guardian Wills and Estates has not given any specific taxation, accounting or financial planning advice in this matter.

SIGNED _____

SIGNED _____

DATE _____

DATE _____