# Preparing your will — instructions for your legal practitioner

### To prepare your will we need to know specific information about you, your family and your assets. The information you provide will be kept confidential and only used for the purpose of preparing your will. We suggest you keep a copy of form as the information will assist your executor(s) to identify your beneficiaries, assets and records and some questions have been included for this reason.

**Your personal details**

**Name on birth certificate** enter your full name

**Also known as** enter any other names you are known as

**Former name(s)** enter any former names(s)

**Residential address** street number and name

suburb/town

state/territorypostcode

**Occupation** current occupation

**If retired, occupation prior** prior occupation to retirement

**Gender** enter your gender here **Preferred pronouns (if any)** enter your preferred pronouns here **Date of birth** click or tap to enter a date.

**Place of birth** enter town and country of birth **Citizenship details** list country/countries where you are a citizen

**Medicare number** enter your medicare number

**Name and address of GP** enter the name of your GP

street number and name

suburb/townstate/territorypostcode

 **Pension number and type\*** enter pension number and type

**\***These details will assist your executor to administer your estate. In addition you should make sure your executor knows your tax file number as it can be very difficult to obtain this information after your death.

**Life partner details** (A life partner includes your spouse, de facto, domestic partner and significant other).

**Name** enter your life partner’s name

**Address** street number and name

suburb/townstate/territorypostcode

**Date of birth** click or tap to enter a date.

**Are you married to this person? Yes** [ ]  **No** [ ]

**If YES:**

**Date of marriage** click or tap to enter a date.

**Place of marriage** suburb/town

**Date relationship commenced** click or tap to enter a date approx.. is OK.

(prior to marriage)

Please provide details of **any former life partner(s)** if you wish to include them in your will or you think that they may make a claim against your estate.

**Name** enter your former life partner’s name

**Date relationship commenced** click or tap to enter a date approx.. is OK.

**Date of separation** click or tap to enter a date approx.. is OK.

**Is this former life partner alive? Yes** [ ]  **No** [ ]  **Don’t know** [ ]

**Were you married to your Yes** [ ]  **No** [ ]

**former life partner?**

**Years of marriage** enter number of years **Are you divorced? Yes**[ ]  **No** [ ]

**If YES, date divorced** click or tap to enter a date approx.. is OK.

**Your child(ren)**

### To avoid issues that have arisen in some wills it is important that we know details of all of your children (if any) and even if estranged and whether they are your biological children, step-children, donor-conceived or adopted.

1. **Name** enter child’s name **Date of birth** click or tap to enter a date.

**Names of parents** enter parents name(s)

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**Names of parents** enter parents name(s)

**Guardian(s)**

### You can specify in your will the person(s) who you prefer to be the guardian of any children who are minors at the time of your death.

### **Details of your preferred guardian(s):**

**Name** enter preferred guardian name

**Address** street number and name

suburb/townstate/territorypostcode

**Relationship to you (if any)** enter relationship

**Name** enter preferred guardian name

**Address** street number and name

suburb/townstate/territorypostcode

**Relationship to you (if any)** enter relationship

**Name** enter preferred guardian name

**Address** street number and name

suburb/townstate/territorypostcode

**Relationship to you (if any)** enter relationship

**Name** enter preferred guardian name

**Address** street number and name

suburb/townstate/territorypostcode

**Relationship to you (if any)** enter relationship

**Family documentation**

### Location of birth certificate / marriage certificate / citizen certificates / identity documents:

**Location of any existing or previous wills** enter location

**Date** Click or tap to enter a date.

**Executor(s) for new will**

Carefully consider who you would like to be your executor. They are someone you trust to fulfil your wishes as set out in your will and administer your estate.

**Name** enter preferred guardian name

**Address** street number and name

suburb/townstate/territorypostcode

**Relationship to you (if any)** enter relationship

**Name** enter preferred guardian name

**Address** street number and name

suburb/townstate/territorypostcode

**Relationship to you (if any)** enter relationship

**Specific gifts**

Please list any specific gift you wish to make.

**Name** enter gift recipient name

**Address** street number and name

suburb/townstate/territorypostcode

**Gift** specify gift

**Relationship to you (if any)** enter relationship

**Name** enter gift recipient name

**Address** street number and name

suburb/townstate/territorypostcode

**Gift** specify gift

**Relationship to you (if any)** enter relationship

**Name** enter gift recipient name

**Address** street number and name

suburb/townstate/territorypostcode

**Gift** specify gift

**Relationship to you (if any)** enter relationship

# Balance (residuary) of your estate

The residuary of your estate is everything remaining in your estate after specific gifts have been made and all debts paid. We need to know what assets you have to be able to properly advise you on the terms of your will and to understand how your residuary will be distributed after your death.

### **Who do you want the balance (residuary) of your estate to go to:**

**Name** enter recipient name

**Address** street number and name

suburb/townstate/territorypostcode

**% of estate** specify percentage

**Name** enter recipient name

**Address** street number and name

suburb/townstate/territorypostcode

**% of estate** specify percentage

**Financial details**

**ABN (if any)** enter Australian Business Number

**Accountant:**

**Name** enter accountant name

**Address** street number and name

suburb/townstate/territorypostcode

## **Financial institution account details**

**Institution name:** enter financial institution name

**Account name:** enter name of account **Branch:** enter branch location

**Account number:** enter account number **BSB:** enter BSB number

**Crypto currency details (eg bitcoin) if any**

Enter crypto currency details here

Make sure your executor is able to find your login and password details to access your account. For example, you place the details in a bank safety deposit box and tell the executor how to access the bank safety deposit box.

## **Location of accounting/financial records other than those held by your accountant**

**Name** enter name of person holding records

**Address** street number and name

suburb/townstate/territorypostcode

# Details of any company you hold an office in

**Name** enter name of company **Purpose** purpose of company

**Reg. office/location** enter location of company

**Your position** enter your position in the company

**Details of any trust you have any involvement in**

**Name** enter name of trust **Purpose** enter name of trust

**Location of Trust documents** enter location of documents

**Your position** enter location of documents

**Are there any beneficiary loans? Yes (see below)** [ ]  **No** [ ]

**If YES, please provide:**

**Further information about any Trusts** enter info. Re Trusts

**Please provide a copy of the last annual return for the trust to your solicitor.**

# Details of any other business interests

**Name** enter name of business **Purpose** enter name of business

**% of ownership** enter name of business

# Real estate details

### **We will conduct a title search of each property to confirm ownership.**

Our title search will confirm the ownership of the land. If you hold the land as a joint proprietor any interest will pass to the surviving joint proprietor regardless of the terms of your Will. If held as tenants in common your interest will pass according to the terms of your will.

**Address** street number and name

suburb/townstate/territorypostcode

**Volume and folio number**

**(if known)** enter volume and folio number

**Name of title** enter name on title

**Mortgage details (if any)** enter mortgage details

**Location of paper title** enter location of title

**Address** street number and name

suburb/townstate/territorypostcode

**Volume and folio number**

**(if known)** enter volume and folio number

**Name of title** enter volume and folio number

**Mortgage details (if any)** enter volume and folio number

**Location of paper title** enter volume and folio number

**Other assets**

**Type of asset** enter brief description of asset

**Owner** enter owner of asset

**Estimate of value** estimate of value $AUD

# Debts and other liabilities (credit cards, loans, hire purchase etc)

**Amount** enter amount of debt $AUD

**Who is owed the debt** debt owed to

**Security (if any)** enter security

**Superannuation**

### Money from your superannuation will not usually form part of your estate unless you have nominated your estate as beneficiary but even then, the nomination may not be binding. It is important to consider who is likely to receive your superannuation when considering how to gift your other assets in your will.

**Fund name** enter fund name

**Name of beneficiary** enter fund name

**Estimate of amount** enter fund name

**Life insurance policy**

Usually the beneficiary named in your life insurance policy will receive any payout so the amount is not part of your estate.

**Insurer** enter fund name

**Policy number** enter fund name

**Beneficiary** enter fund name

**Location of documents** Location of life insurance documents

**Online presence**

You may wish to leave a note to your executor(s) about what is to happen to any online accounts and provide them with any login details. You can also include the details of any web address below for convenience.

**Web address** enter url here

**Funeral preference**

Give some consideration to your funeral arrangements to assist your loved ones to comply with your wishes. Loved ones may also need to know if you are a donor and details of any pre-arrangements.

**Cremation** [ ]  **Burial** [ ]  **Other** enter your preference

**Registered for organ donation Yes** [ ]  **No** [ ]

**Preferred funeral director** enter name of funeral director

**Details of any pre-arrangements**

**Name of cemetery** enter name of cemetery

**Deed number** enter deed number

**Name issued under** enter name issued under

**Any other details** any other details here

**Other comments/wishes**

Is there anything else you would like to tell us which you think assists us to prepare your will?

|  |
| --- |
| Enter your note here. This box will grow as you enter text. |

**Signed**

**Date** Click or tap to enter a date.

**Or electronic signature**

I enter name of signee here agree that once my name is inserted this will be treated as an electronic signature in accordance with section 9 of the *Electronic Transactions (Victoria) Act 1999* (Vic).

[**LPLC Testamentary Capacity Checklist**](https://lplc.com.au/uploads/main/Resources/Checklists/Testamentary-Capacity-Checklist.pdf)