

Estate Planning Data Collection

Book

Client name:

Date:

McMahon Clarke Legal Privacy Statement

Your information is treated confidentially

When you enquire about or receive legal services, we record information about you, mainly to assess your requirements for legal services. If you become a client of McMahon Clarke Legal, then we use the information to provide legal services.

We also use and may disclose your information for the following purposes:

- To consider other enquiries made by you to us.
- To help us develop and identify products and services that may interest you.
- To tell you about products and services (unless you have asked us not to) or to recommend legal products and services.
- To maintain our relationship with you.
- To conduct market or client satisfaction research.
- To perform our internal administration and operations, including accounting, reporting, risk management, record keeping, archiving, systems development and testing and staff training.
- To comply with legislative or regulatory requirements.

Collection of your information is essential for us to service your relationship with us and our business operations. Without your information we would not be able to provide you with our products and services.

From time to time, we may disclose some of your information to the following types of organisations (including individuals):

- Your agents, including other legal advisers.
- Your executor, administrator, trustee, guardian or attorney.
- Regulatory bodies, government agencies, law enforcement agencies and courts.
- Other parties we are authorised or required by law to disclose information to.

How you can gain access to the information

You can access your information during business hours. Telephone or write to us using the contact details listed on this page and ask for the privacy officer.

Contact us

McMahon Clarke Legal

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Brisbane QLD 4001

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F 07 3831 1121

www.mcmahonclarke.com

Section A: Personal and contact details

Your personal details

	Client 1	Client 2 (Spouse/Partner)
Surname	<input type="text"/>	<input type="text"/>
Full given name	<input type="text"/>	<input type="text"/>
Have you been known by another name or do you use a name different to that on your birth certificate? (e.g. maiden name) <i>If yes, then please give details</i>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Preferred name	<input type="text"/>	<input type="text"/>
Date of birth	<input type="text"/>	<input type="text"/>
Occupation	<input type="text"/>	<input type="text"/>

Your contact details

	Client 1	Client 2 (Spouse/Partner)
Residential address		
Street number and name	<input type="text"/>	<input type="text"/>
Suburb	<input type="text"/>	<input type="text"/>
State, postcode	<input type="text"/>	<input type="text"/>
Postal address <i>(if different from above)</i>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Contact numbers: Home	<input type="text"/>	<input type="text"/>
Business	<input type="text"/>	<input type="text"/>
Mobile	<input type="text"/>	<input type="text"/>
Facsimile	<input type="text"/>	<input type="text"/>
Preferred number to reach you during business hours	<input type="radio"/> Home <input type="radio"/> Business <input type="radio"/> Mobile	<input type="radio"/> Home <input type="radio"/> Business <input type="radio"/> Mobile
Email address	<input type="text"/>	<input type="text"/>

Your contact details (cont)

	Client 1	Client 2 (Spouse/Partner)
Preferred address for draft documents	<input type="radio"/> Email address <input type="radio"/> Postal address	<input type="radio"/> Email address <input type="radio"/> Postal address
Document storage Where would you prefer your documents be stored?	<input type="radio"/> McMahon Clarke Legal (MCL) safe custody <input type="radio"/> With adviser <input type="radio"/> Own arrangements	<input type="radio"/> McMahon Clarke Legal (MCL) safe custody <input type="radio"/> With adviser <input type="radio"/> Own arrangements
<i>Note: We recommend your original signed Will is stored using MCL's safe custody service. This ensures your original Will won't be misplaced. This is a free service provided by MCL. You are of course encouraged to keep a copy of your Will with your important papers.</i>		

Current arrangements

	Client 1	Client 2 (Spouse/Partner)
Prior Will		
Do you have a prior Will?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
If yes, then please provide date of prior Will	<input type="text"/>	<input type="text"/>
Where is it located?	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Enduring power of attorney		
Do you have an enduring power of attorney for financial matters?	<input type="radio"/> Yes <input type="radio"/> No <i>If yes, then please provide copies</i>	<input type="radio"/> Yes <input type="radio"/> No <i>If yes, then please provide copies</i>
Do you have an enduring power of attorney for personal/health or medical/guardianship matters?	<input type="radio"/> Yes <input type="radio"/> No <i>If yes, then please provide copies</i>	<input type="radio"/> Yes <input type="radio"/> No <i>If yes, then please provide copies</i>

Section B: Family details

Marital status

	Client 1	Client 2 (Spouse/Partner)
Marital status	<input type="radio"/> Single <input type="radio"/> Married <input type="radio"/> Divorced <input type="radio"/> Separated (not divorced) <input type="radio"/> De facto <input type="radio"/> Widowed	<input type="radio"/> Single <input type="radio"/> Married <input type="radio"/> Divorced <input type="radio"/> Separated (not divorced) <input type="radio"/> De facto <input type="radio"/> Widowed
Have you ever been in a prior marriage or de facto relationship?	<input type="radio"/> Yes <input type="radio"/> No <input type="text"/> If yes, then please provide full details in space provided (e.g. date of divorce/separation, date of property order)	<input type="radio"/> Yes <input type="radio"/> No <input type="text"/> <input type="text"/> <input type="text"/>
Do you have any ongoing financial commitments from a previous relationship, e.g. child support or maintenance payments? <i>If yes, then please provide copies of any agreements or orders</i>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

Children of your relationship

	Client 1	Client 2 (Spouse/Partner)
CHILD ONE		
Surname	<input type="text"/>	<input type="text"/>
Full given names	<input type="text"/>	<input type="text"/>
Please state the child's relationship to you	<input type="radio"/> Prior marriage/relationship <input type="radio"/> Current marriage/relationship	<input type="radio"/> Prior marriage/relationship <input type="radio"/> Current marriage/relationship
Please indicate if the child is adopted or a stepchild (if applicable)	<input type="radio"/> Adopted <input type="radio"/> Stepchild	<input type="radio"/> Adopted <input type="radio"/> Stepchild
Residential address		
Street number and name	<input type="text"/>	<input type="text"/>
Suburb	<input type="text"/>	<input type="text"/>
State, postcode	<input type="text"/>	<input type="text"/>

Children of your relationship (cont)

	Client 1	Client 2 (Spouse/Partner)
CHILD TWO		
Surname	<input type="text"/>	<input type="text"/>
Full given names	<input type="text"/>	<input type="text"/>
Please state the child's relationship to you	<input type="radio"/> Prior marriage/relationship <i>Please state name of other parent</i>	<input type="radio"/> Prior marriage/relationship <i>Please state name of other parent</i>
	<input type="radio"/> Current marriage/relationship	<input type="radio"/> Current marriage/relationship
	<input type="text"/>	<input type="text"/>
Please indicate if the child is adopted or a stepchild (if applicable)	<input type="radio"/> Adopted	<input type="radio"/> Adopted
	<input type="radio"/> Stepchild	<input type="radio"/> Stepchild
Residential address		
Street number and name	<input type="text"/>	<input type="text"/>
Suburb	<input type="text"/>	<input type="text"/>
State, postcode	<input type="text"/>	<input type="text"/>
CHILD THREE		
Surname	<input type="text"/>	<input type="text"/>
Full given names	<input type="text"/>	<input type="text"/>
Please state the child's relationship to you	<input type="radio"/> Prior marriage/relationship <i>Please state name of other parent</i>	<input type="radio"/> Prior marriage/relationship <i>Please state name of other parent</i>
	<input type="radio"/> Current marriage/relationship	<input type="radio"/> Current marriage/relationship
	<input type="text"/>	<input type="text"/>
Please indicate if the child is adopted or a stepchild (if applicable)	<input type="radio"/> Adopted	<input type="radio"/> Adopted
	<input type="radio"/> Stepchild	<input type="radio"/> Stepchild
Residential address		
Street number and name	<input type="text"/>	<input type="text"/>
Suburb	<input type="text"/>	<input type="text"/>
State, postcode	<input type="text"/>	<input type="text"/>
Does any child have special needs because of a physical or intellectual disability, addiction or particular vulnerability?	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

If there are further children, then please provide the above information on the extra pages provided at the end of this booklet.

Section C : Executors and substitute executors

Preferred executors

Your executors are the people responsible for administering your wishes as set out in your Will. Their tasks include the following:

- Making your funeral arrangements.
- Identifying your assets and paying your debts.
- Distributing the balance of your assets (after paying your debts) according to your wishes.

You can nominate a maximum of four executors to act. You should obtain each executor's consent before making a nomination.

In selecting your executors you should keep in mind the following:

- If you intend to leave the majority of your assets to a single person (eg. spouse), then it makes sense for that person to also be nominated as an (if not, the only) executor.
- You can nominate an independent person (eg. friend or adviser) who you trust to act as co-executor if you wish.
- Consider the executor's age before nominating them. It does not make sense to nominate an executor who is likely to pass away before you. If you nominate someone who is older than you, then make sure you nominate a substitute executor as well.

You should also consider nominating a substitute executor(s), in the event a nominated executor cannot act for some reason. For example, they may predecease you.

	Client 1	Client 2 (Spouse/Partner)
EXECUTOR 1		
Surname	<input type="text"/>	<input type="text"/>
Full given names	<input type="text"/>	<input type="text"/>
Occupation	<input type="text"/>	<input type="text"/>
Street address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Relationship to Willmaker	<input type="text"/>	<input type="text"/>



Preferred executors (cont)

	Client 1	Client 2 (Spouse/Partner)
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EXECUTOR 2 (OPTIONAL) to act jointly with Executor 1

Surname	<input type="text"/>	<input type="text"/>
Full given names	<input type="text"/>	<input type="text"/>
Occupation	<input type="text"/>	<input type="text"/>
Street address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Relationship to Willmaker	<input type="text"/>	<input type="text"/>

EXECUTOR 3 (OPTIONAL) to act jointly with Executor 1 and 2

Surname	<input type="text"/>	<input type="text"/>
Full given names	<input type="text"/>	<input type="text"/>
Occupation	<input type="text"/>	<input type="text"/>
Street address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Relationship to Willmaker	<input type="text"/>	<input type="text"/>

EXECUTOR 4 (OPTIONAL) to act jointly with Executor 1, 2 and 3

Surname	<input type="text"/>	<input type="text"/>
Full given names	<input type="text"/>	<input type="text"/>
Occupation	<input type="text"/>	<input type="text"/>
Street address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Relationship to Willmaker	<input type="text"/>	<input type="text"/>



Substitute executors

You should appoint substitute executors in the event a nominated executor predeceases you or is unable or unwilling to act as your executor. You should contact executors before nominating them to confirm they are willing to act.

If you have nominated three executors in the earlier section, then there is no need to nominate three substitutes (although you may if you wish).

If you nominate a substitute executor, then you must indicate whether they are a substitute for a particular executor, or for any one of your nominated executors who are unable or unwilling to act.

For example, if you have appointed an adviser as an executor, then their substitute may be a partner/principal of the firm where they work.

	Client 1	Client 2 (Spouse/Partner)
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SUBSTITUTE EXECUTOR 1

Substitute executor for	<input type="radio"/> _____ <i>insert name</i>	<input type="radio"/> _____ <i>insert name</i>
	<input type="radio"/> Any of my nominated executors	<input type="radio"/> Any of my nominated executors
Surname	<input type="text"/>	<input type="text"/>
Full given names	<input type="text"/>	<input type="text"/>
Occupation	<input type="text"/>	<input type="text"/>
Street address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Relationship to Willmaker	<input type="text"/>	<input type="text"/>

SUBSTITUTE EXECUTOR 2

Substitute executor for	<input type="radio"/> _____ <i>insert name</i>	<input type="radio"/> _____ <i>insert name</i>
	<input type="radio"/> Any of my nominated executors	<input type="radio"/> Any of my nominated executors
Surname	<input type="text"/>	<input type="text"/>
Full given names	<input type="text"/>	<input type="text"/>
Occupation	<input type="text"/>	<input type="text"/>
Street address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Relationship to Willmaker	<input type="text"/>	<input type="text"/>



Section D: Executor's adviser

	Client 1	Client 2 (Spouse/Partner)
Is there an adviser (financial) to whom your executors may refer when administering your estate?	<input type="radio"/> Yes <input type="radio"/> No <i>If yes, then please provide full details</i>	<input type="radio"/> Yes <input type="radio"/> No <i>If yes, then please provide full details</i>
Name	<input type="text"/>	<input type="text"/>
Occupation	<input type="text"/>	<input type="text"/>
Company	<input type="text"/>	<input type="text"/>
Street address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Phone	<input type="text"/>	<input type="text"/>

Section E: Guardians for your minor children

IMPORTANT INFORMATION:

If you have children under 18 years of age, then you must complete this section. If you pass away and there is no surviving parent, then your Will should nominate who you prefer be given custody of your children (subject to any challenge). It is strongly recommended you discuss this matter with your preferred guardian before signing your Will.

For parents with young children, we recommend you consider preparing a set of Guardianship Guidelines which can be kept with your Will. The purpose of Guardianship Guidelines is to assist your guardians in raising your children by recording your wishes about things such as your child's education, religion, standard of living and other important matters.

Would you like us to talk to you about preparing a set of Guardianship Guidelines? Yes No

Guardian(s) for any minor children *(i.e. if both parents were to pass away)*

GUARDIAN 1

Surname	<input type="text"/>
Full given names	<input type="text"/>
Occupation	<input type="text"/>
Street address	<input type="text"/> <input type="text"/>
Relationship to Willmaker	<input type="text"/>

GUARDIAN 2

Surname	<input type="text"/>
Full given names	<input type="text"/>
Occupation	<input type="text"/>
Street address	<input type="text"/> <input type="text"/>
Relationship to Willmaker	<input type="text"/>



Guardian(s) (replacement)

You may wish to appoint replacement guardians in the event a nominated guardian predeceases you or is unable or unwilling to act as guardian to your minor children. Note: You are not required to nominate a replacement guardian.

GUARDIAN 1 (replacement)

Surname	<input type="text"/>
Full given names	<input type="text"/>
Occupation	<input type="text"/>
Street address	<input type="text"/> <input type="text"/>
Relationship to Willmaker	<input type="text"/>

GUARDIAN 2 (replacement)

Surname	<input type="text"/>
Full given names	<input type="text"/>
Occupation	<input type="text"/>
Street address	<input type="text"/> <input type="text"/>
Relationship to Willmaker	<input type="text"/>

Section F: Distribution of your estate

Part 1: Specific gifts of personal items and cash gifts

This section should be completed if you wish to gift personal items (e.g. jewellery, wine, artwork, antiques, motor vehicles) to certain people. If you do not make specific gifts, then your personal items will either be sold by your executors and the proceeds distributed with the balance of your estate, or your executors will divide the items among your beneficiaries (nominated below).

You should also complete this section if you wish to make a cash gift (of a certain amount or percentage of your estate) to a person or organisation (e.g. a charity).

	Client 1	Client 2 (Spouse/Partner)
PERSONAL ITEMS		
Do you wish to make a specific gift of any personal items?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
If yes, then do you wish to leave a separate list with your Will which can be updated from time to time without needing to update your Will?	<input type="radio"/> Yes <i>I wish to leave a separate list</i> <input type="radio"/> No <i>I wish to list the items in my Will</i>	<input type="radio"/> Yes <i>I wish to leave a separate list</i> <input type="radio"/> No <i>I wish to list the items in my Will</i>
If the person who you nominate (either now or in a separate list) to receive a personal item is a beneficiary of the balance of your estate, then do you want the value of the personal item to be taken into account in the overall division of your estate? <i>(e.g. If you have a son and a daughter and you gift your daughter a \$10,000 diamond ring, then should she receive \$10,000 less from the balance of your estate, so the end result is that your son and daughter share equally in your estate?)</i>	<input type="radio"/> Yes <i>I wish an adjustment to be made for the value of any personal items</i> <input type="radio"/> No <i>There should not be an adjustment made for the value of any personal items (i.e. it is an extra gift to the beneficiary)</i>	<input type="radio"/> Yes <i>I wish an adjustment to be made for the value of any personal items</i> <input type="radio"/> No <i>There should not be an adjustment made for the value of any personal items (i.e. it is an extra gift to the beneficiary)</i>
CASH GIFTS		
Do you wish to make a cash gift to any person/organisation?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
If yes, then please tick the appropriate box	<input type="radio"/> The cash gift is to be made immediately on my death <input type="radio"/> The cash gift is to be made on the death of the survivor of me and my spouse	<input type="radio"/> The cash gift is to be made immediately on my death <input type="radio"/> The cash gift is to be made on the death of the survivor of me and my spouse



Part 1: Specific gifts of personal items and cash gifts (cont)

Please use this section to list the personal items or cash gifts you intend to make. We will either include these in your will or in a separate list depending on your instructions on the previous page.

	Client 1	Client 2 (Spouse/Partner)
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Asset/cash gift 1

Description	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

RECIPIENT DETAILS

Surname	<input type="text"/>	<input type="text"/>
Full given names	<input type="text"/>	<input type="text"/>
Street address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Relationship to Willmaker	<input type="text"/>	<input type="text"/>

Asset/cash gift 2

Description	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

RECIPIENT DETAILS

Surname	<input type="text"/>	<input type="text"/>
Full given names	<input type="text"/>	<input type="text"/>
Street address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Relationship to Willmaker	<input type="text"/>	<input type="text"/>



Part 1: Specific gifts of personal items and cash gifts (cont)

	Client 1	Client 2 (Spouse/Partner)
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Asset/cash gift 3

Description	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

RECIPIENT DETAILS

Surname	<input type="text"/>	<input type="text"/>
Full given names	<input type="text"/>	<input type="text"/>
Street address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Relationship to Willmaker	<input type="text"/>	<input type="text"/>

Asset/cash gift 4

Description	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

RECIPIENT DETAILS

Surname	<input type="text"/>	<input type="text"/>
Full given names	<input type="text"/>	<input type="text"/>
Street address	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Relationship to Willmaker	<input type="text"/>	<input type="text"/>

Part 2: Distribution of balance of the estate

	Client 1	Client 2 (Spouse/Partner)
YOUR BENEFICIARIES		
If you die before your spouse/partner, do you want to leave all your assets to your spouse/partner?	<input type="radio"/> Yes <i>I want to leave everything to my spouse via an optional discretionary testamentary trust</i> <input type="radio"/> No <i>I want to leave all my assets as set out later in these instructions</i>	<input type="radio"/> Yes <i>I want to leave everything to my spouse via an optional discretionary testamentary trust</i> <input type="radio"/> No <i>I want to leave all my assets as set out later in these instructions</i>
If your spouse/partner dies before you, and you have children who are living, then do you want to leave everything to your children (including children born after your death) equally?	<input type="radio"/> Yes <input type="radio"/> No <i>I want to leave all my assets as set out later in these instructions</i>	<input type="radio"/> Yes <input type="radio"/> No <i>I want to leave all my assets as set out later in these instructions</i>
If your spouse/partner and one or more of your children dies before you, then do you want the share that would have gone to a deceased child to go instead to his or her children (including children born after your death) equally?	<input type="radio"/> Yes <input type="radio"/> No <i>In this case I want the share of a deceased child to go to my other living children equally</i>	<input type="radio"/> Yes <input type="radio"/> No <i>In this case I want the share of a deceased child to go to my other living children equally</i>
OTHER ISSUES		
Do you want to specify an age that a beneficiary must reach before they can take their inheritance?	For a beneficiary to receive their inheritance I specify they must be: <input type="radio"/> 18 years of age <input type="radio"/> 21 years of age <input type="radio"/> 25 years of age <input type="radio"/> Age _____ (please insert desired age)	For a beneficiary to receive their inheritance I specify they must be: <input type="radio"/> 18 years of age <input type="radio"/> 21 years of age <input type="radio"/> 25 years of age <input type="radio"/> Age _____ (please insert desired age)
Do you want to discuss placing some controls or conditions on the ability of your beneficiaries to access their inheritance?	<input type="radio"/> Yes, I want to discuss the options available to me when we meet <input type="radio"/> No	<input type="radio"/> Yes, I want to discuss the options available to me when we meet <input type="radio"/> No
Are there any outstanding loans which you have made to your beneficiaries (e.g. your children)?	<input type="radio"/> Yes <input type="radio"/> No If yes, then: <input type="checkbox"/> Yes, my executors may elect to either forgive or continue the loan and there will be an adjustment made to the share of my estate to which that beneficiary will receive <input type="checkbox"/> No, my executors may not forgive the loan i.e. (it must be repaid on my death) <i>(Please provide us with a copy of the loan agreement (if any) or details of the loan, including full name of the borrower and lender, amount of the loan, and terms of the loan)</i>	<input type="radio"/> Yes <input type="radio"/> No If yes, then: <input type="checkbox"/> Yes, my executors may elect to either forgive or continue the loan and there will be an adjustment made to the share of my estate to which that beneficiary will receive <input type="checkbox"/> No, my executors may not forgive the loan i.e. (it must be repaid on my death) <i>(Please provide us with a copy of the loan agreement (if any) or details of the loan, including full name of the borrower and lender, amount of the loan, and terms of the loan)</i>

Part 3: Reserve beneficiaries

The purpose of naming reserve beneficiaries is to ensure your estate is distributed according to your wishes in the event you and your nominated beneficiaries die in a common accident, or you are the last survivor in your family.

In this situation some couples decide to leave one half of their estate to their own family and the other half of their estate to their spouse's family. Alternatively you may elect to nominate one or more charities or some combination of these options. Please nominate your reserve beneficiaries and the share of your estate they will receive.

	Client 1	Client 2 (Spouse/Partner)
RESERVE BENEFICIARY		
Parents/Parents-in-law <i>Full given names</i>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	_____ % (Percentage of residue)	_____ % (Percentage of residue)
Siblings <i>Full given names</i>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	_____ % (Percentage of residue)	_____ % (Percentage of residue)
Nephews/Nieces <i>Full given names</i>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	_____ % (Percentage of residue)	_____ % (Percentage of residue)
Cousins <i>Full given names</i>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	_____ % (Percentage of residue)	_____ % (Percentage of residue)
Friends/others <i>Full given names</i>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	_____ % (Percentage of residue)	_____ % (Percentage of residue)
Charities/Organisations <i>Full given names</i>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	_____ % (Percentage of residue)	_____ % (Percentage of residue)
If a reserve beneficiary nominated above predeceases you, then their share of your estate should be:	<input type="radio"/> Paid to the estate of the deceased reserve beneficiary and distributed according to their Will	<input type="radio"/> Paid to the estate of the deceased reserve beneficiary and distributed according to their Will
	<input type="radio"/> Distributed to the surviving children of the deceased reserve beneficiary in equal shares	<input type="radio"/> Distributed to the surviving children of the deceased reserve beneficiary in equal shares
	<input type="radio"/> Distributed to the surviving reserve beneficiaries named above	<input type="radio"/> Distributed to the surviving reserve beneficiaries named above

Other matters

	Client 1	Client 2 (Spouse/Partner)
<p>Organs</p> <p>Would you like to donate your organs?</p> <p><i>Note: If you would like to donate your organs, then you must advise your next of kin and you should also register as an organ donor. You can register to become an organ donor online at www.medicareaustralia.gov.au</i></p>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
<p>Would you like to donate your body to medical research?</p>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
<p>Funeral arrangements</p>	<input type="radio"/> Burial <input type="radio"/> Cremation	<input type="radio"/> Burial <input type="radio"/> Cremation

Include here any special instructions for your funeral:

Important declaration

<p>Please complete the following to apply in the event you die before you execute your new Will:</p>	<input type="radio"/> I revoke all former Wills and declare that if I die before signing my formal Will, then my instructions above shall take effect. <input type="radio"/> No, I do not want these instructions to be treated as my Will, as I may change or alter them prior to signing a new Will.	<input type="radio"/> I revoke all former Wills and declare that if I die before signing my formal Will, then my instructions above shall take effect. <input type="radio"/> No, I do not want these instructions to be treated as my Will, as I may change or alter them prior to signing a new Will.
Dated	<input type="text"/>	<input type="text"/>
Signature of Client	<input type="text"/>	<input type="text"/>
Witness to Client's signature	<input type="text"/>	<input type="text"/>
Full name of witness	<input type="text"/>	<input type="text"/>
Occupation of witness	<input type="text"/>	<input type="text"/>
Address of witness	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

Section G: Assets and liabilities

	Client 1	Client 2 (Spouse/Partner)
Are you expecting an inheritance?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

Wills that incorporate testamentary trusts can significantly benefit those who receive an inheritance. The benefits of asset protection and taxation advantages through income splitting and the concessional tax treatment for minor beneficiaries means that, as a beneficiary, you can protect your inheritance from attack and potentially derive significant income tax concessions. These advantages are only available if the Will under which you inherit contains testamentary trust provisions. If appropriate, then it may be in your best interests to suggest this to those who may wish to leave you part of their estate.

1. Ownership of assets (provide information on a separate page if necessary)

Asset (e.g family home, share portfolio)	Ownership (joint tenants, family trust, company)	Estimated value	Associated debt	Is it a pre CGT/ post-CGT asset?

2. Entity details

TRUST DETAILS (drawing a diagram of your ownership structure can be helpful)

Trust name	Trustees (if a company, then include company name and ACN)	Type of trust (e.g unit, discretionary)

COMPANY DETAILS

Name	ACN	Directors	Shareholders	Nature of business

SUPERANNUATION

Name of fund	Trustee (if a company, then include company name and ACN)	Fund type (self-managed, employer sponsored, etc)	Member(s)	Current balance	Have you nominated a beneficiary?



LIFE INSURANCE

Name of insurer	Life insured	Type of cover (e.g death, TPD, trauma)	Nominated beneficiary (e.g superfund, individual)	Level of cover

PARTNERSHIPS

Name	Trading name	Partner details	Your partnership share	Business activities

Section H: Preparation of other documents

Please list here any other areas you would like to discuss in our initial meeting:

- Preparation of enduring powers of attorney. An enduring power of attorney is a document which allows you to appoint a trusted person to act on your behalf in the event you are unable to do so (e.g. you lose capacity). You can appoint an attorney to conduct your financial affairs on your behalf (financial attorney) and also to make medical/guardianship decisions (guardian) on your behalf. Your financial attorney and guardian can be different and, in some instances, you may appoint more than one.
- Preparation of binding nomination for superannuation. A binding nomination may be appropriate if you wish to bind the payment of your super benefits to a particular person.
- Reviewing/altering/updating of any trust deed for succession purposes and/or trust law and taxation law purposes. If so, then please bring copies of all trust deeds to our initial meeting.
- Arranging of extra insurance cover to enhance estate assets. If so, then please bring details of your current insurance policies to our initial meeting.
- Preparation of business succession agreements. This may be necessary if you own a business in partnership with someone else.
- Preparation of a shareholders agreement. This may be necessary if you run your business through a company or own significant assets in a company and there are other shareholders involved.
- Preparation of family loan documents. This may be necessary if you have provided loans to one or more of your beneficiaries (e.g. your children).
- Severing a joint tenancy. This may be necessary if you and your spouse own your home as joint tenants rather than tenants in common.
- Other _____

Section I: Checklist

Documents and information to bring to the initial meeting:

- Copy of any financial and/or estate plan prepared by your adviser.
- Copy of the title deeds to your properties.
- Any existing Wills and powers of attorney.
- A copy of your most recent superannuation statements.
- A copy of your trust deeds (e.g. family or discretionary trust deed or unit trust deed). If your trust has made a family trust election (FTE), then we require details of the FTE as it may restrict the people who are eligible to receive distributions from the trust in future. Your accountant should be able to tell you if your trust has made a FTE and provide you with the details of the FTE.
- A copy of your self managed superannuation fund trust deed (if any).
- Copies or details of any life insurance policies.



Section J: Family tree

On this page, please provide us with a sketch of your family tree including you, your spouse or partners (as well as any former spouse or partner), your children, grandchildren etc (and their current and former spouses or partners) and any other members of your family who you intend to provide a benefit from your estate. This will assist us in our initial meeting.

