

Wills, Powers of Attorney and Enduring Guardianship

For couples

1. DOCUMENTS TO BE PREPARED

	Client 1	Client 2
Will (<i>Succession Act 2006</i>)		
• Single person will	<input type="checkbox"/>	<input type="checkbox"/>
• Spouse to spouse will – <i>includes de facto and same sex</i>	<input type="checkbox"/>	<input type="checkbox"/>
• Blended family will	<input type="checkbox"/>	<input type="checkbox"/>
Power of Attorney (<i>Power of Attorney Act 2003</i>)	<input type="checkbox"/>	<input type="checkbox"/>
Enduring Guardianship (<i>Guardianship Act 2004</i>)	<input type="checkbox"/>	<input type="checkbox"/>

2. ABOUT YOU

Client 1

Name:

Address:

Postal address:

Contact:

Home:

Work:

Mobile:

Email:

Occupation:

Date of birth:

Client 2

Name:

Address – Same as client 1

Postal address – Same as client 1

Contact: – Same as client 1

Home:

Work:

Mobile:

Email:

Occupation:

Date of birth:

3. EXISTING WILL

	Client 1	Client 2
Do you have an existing Will?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, will you make arrangements to cancel?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other arrangements (<i>Client 1</i>):	_____	
Other arrangements (<i>Client 2</i>):	_____	

4. EXECUTOR / TRUSTEE

Client 1

Each other as executor: Yes No

If not, name and address of executor to be:

Alternate executor:

Further alternate executor:

Client 2 – Same as client 1

Each other as executor: Yes No

If not, name and address of executor to be:

Alternate executor:

Further alternate executor:

5. IF REQUIRED – GUARDIAN OF MINOR CHILDREN

Client 1

Name:

Address:

Client 2 - Same as client 1

Name:

Address:

6. SPECIFIC BEQUESTS

Client 1

Any specific bequests, gifts, donations:

Right of residency:

After residency ends then property to:

- Residual estate
 Other beneficiary:

Client 2 - Same as client 1

Any specific bequests, gifts, donations:

Right of residency:

After residency ends then property to:

- Residual estate
 Other beneficiary:

7. BENEFICIARIES OF RESIDUAL ESTATE

It must be remembered that the provisions of a will do not affect the disposal of joint tenancy property or superannuation accounts. Joint tenancy property can only be dealt with if the joint tenancy is first severed into a tenancy in common. Superannuation needs to be dealt with by binding nomination.

Client 1

To: _____

To each other

Then

Children

At age: 18 21 _____

Equally between all children

Including children of spouse

½ to children and ½ to spouse's children

Then

Grandchildren

At age: 18 21 _____

Equally between all grandchildren

Including grandchildren of spouse

½ to grandchildren and ½ to spouse's grandchildren

Then

If none of the above beneficiaries survive

then to:

Client 2 - Same as client 1

To: _____

To each other

Then

Children

At age: 18 21 _____

Equally between all children

Including children of spouse

½ to children and ½ to spouse's children

Then

Grandchildren

At age: 18 21 _____

Equally between all grandchildren

Including grandchildren of spouse

½ to grandchildren and ½ to spouse's grandchildren

Then

If none of the above beneficiaries survive

then to:

8. SUPERANNUATION / INSURANCE

Client 1

Super fund name:

Details:

Binding nomination required: Yes No

Firm will prepare

Client will attend to

N.B. Binding nominations are usually required to be renewed every three years.

Insurance company name:

Details:

Client 2

Super fund name:

Details:

Binding nomination required: Yes No

Firm will prepare

Client will attend to

Insurance company name:

Details:

9. JOINT TENANCIES

Client 1

Any joint tenancies to be severed: Yes No

If yes, details:

Client 2

Any joint tenancies to be severed: Yes No

If yes, details:

10. ASSETS AND LIABILITIES

Let us know of:

- ✓ All current assets, including any intellectual property or digital assets or business assets, and the type of interest/ownership;
- ✓ Any future assets likely to fall into the Estate;
- ✓ All current debts, including any unregistered liabilities and PPSR registrations, and how these are to be satisfied.

11. IDENTITY DOCUMENTS

Client 1

- Driver licence
- Passport
- Other licence *e.g. Boat, Pilot, Firearm*
- Centrelink ID
- Medicare card
- Other *e.g. Birth certificate*

Details:

Client 2

- Driver licence
- Passport
- Other licence *e.g. Boat, Pilot, Firearm*
- Centrelink ID
- Medicare card
- Other *e.g. Birth certificate*

Details:
