



INSTRUCTIONS FOR A NEW WILL

This document is for information gathering purposes only and does not constitute a legally binding document and/or will.

We will prepare a will for you on your behalf, based on these instructions.

Once prepared, your will is binding once it is signed by you, in the presence of two witnesses who also sign the will. The will must be dated also at the time of signing.

Please email or deliver a copy of these will instructions to the Lawyer/Legal Executive who acts for you:

IS THIS A NEW WILL?	☐ YES ☐ NO
IF NO, WHERE IS YOUR CURRENT, ORIGINAL WILL HELD?	
NAME (your full legal name):	
ADDRESS:	
TELEPHONE NUMBER/S:	
EMAIL ADDRESS/ES:	
DATE OF BIRTH:	
OCCUPATION:	
MARITAL STATUS:	☐ Single ☐ Married ☐ De Facto Relationship ☐ Civil Union ☐ Separated ☐ Divorced
CHILDREN: If under 16 (Please provide their full names, ages, dates of birth)	
NAME/S OF YOUR SUGGESTED *TRUSTEE/S/EXECUTOR/S (Please provide full name/s, and their relationship to you)	

**NAME/S OF YOUR SUGGESTED GUARDIAN/S OF YOUR CHILDREN (If your children are minors)	
ASSETS e.g. property/ies motor vehicle/s, investment/s, life policy/ies), banks or institutions where your money is held	
GIFTS (If you would like to leave a specific item to someone in your will (e.g. jewellery, a specific sum of money to say a grandchild or grandchildren)	
BALANCE OF ESTATE Name the person/people you wish to leave your estate to (please list their full legal name/s)	
Do you have any other information that is relevant to the terms of your new will?	

***Trustee/Executor** – The Executor(s) are the people named in the Will whose job it is to administer the Estate and carry out the terms of the Will, for example dealing with lawyers, making funeral arrangements, ensuring steps are taken to sell the house or similar. This role ends when all distributions have been made that the Will requested.

****Guardian** – A parent can name a person in their Will to be a testamentary guardian if the parent dies, they automatically become a guardian and no application to the Court is required. If the other parent is also a guardian and still alive, the testamentary guardian will share guardianship with the other parent – this is common if the child has two families. The guardian must be at least 20 years old when the parent dies.