



WILLS QUESTIONNAIRE

Date: / /

1. Your details

- 1.1 Full name:
- 1.2 Address:
- 1.3 Home / mobile:
- 1.4 Email:
- 1.5 Date of Birth:
- 1.6 Occupation:

2. Executor(s)

- 2.1 Full name:
- 2.2 Address:
- 2.3 Relationship to you:

3. Substitute executor(s)

- 3.1 Full name:
- 3.2 Address:
- 3.3 Relationship to you:

4. Guardians

- 4.1 Full name:
- 4.2 Address:
- 4.3 Relationship to you:

5. **Specific bequests**

- 5.1 Full name:
- 5.2 Address:
- 5.3 Relationship to you:
- 5.4 Asset:

6. **Right to occupy (see note 4)**

- 6.1 Full name:
- 6.2 Address:
- 6.3 Relationship to you:
- 6.4 Address of property for occupancy:
- 6.5 Remainderman:
- 6.6 Remainderman's address:
- 6.7 Remainderman's relationship to you:
- 6.8 Event upon which right to occupy expires: Resident moving out or passing away /
Resident re-marrying or entering into defacto relationship

7. **Residue of estate**

- 7.1 Full name:
- 7.2 Address:
- 7.3 Relationship to you:
- 7.4 Share %:
- 7.5 Are they to receive as joint tenants or tenants in common? (see note 6) JT / TIC
- 7.6 What age will your beneficiaries be able to inherit? 18 / 21 / 25
- 7.7 Are you a Trustee or Appointor of any trusts? Yes / No
- 7.8 Do you have a self-managed superannuation fund Yes / No

8. Instructions as to body

8.1 Do you wish your body to be buried or cremated? Buried / Cremated

8.2 Do you have any preference as to where your body is to be buried/ashes scattered?
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8.3 Do you wish your organs to be donated? Yes / No

8.4 If yes,

8.5 Do you wish for your organs to be used for transplant? Yes / No

8.6 Do you wish for your organs to be used for research? Yes / No

9. Testamentary Trust

9.1 Do you wish to create a Testamentary Trust for: your spouse / each of your children
separately / other:

9.2 Who is to be the Trustee / Appointor?

9.3 Who are the beneficiaries of the trust entitled to distributions of trust capital?: to
“bloodline” family members but excluding their spouses (NB: legally adopted children
are deemed to be “bloodline”) / all family members including their spouses / other:
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9.4 Who are the beneficiaries of the trust entitled to distributions of trust income?: to
“bloodline” family members but excluding their spouses (NB: legally adopted children
are deemed to be “bloodline”) / all family members including their spouses / other:
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9.5 What property/assets/money in the estate will be gifted by Testamentary Trust?

10. Additional notes

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