

# Will Preparation Checklist

To assist you in your Will preparation you may find it helpful to make notes on this checklist.

## Your Estate

Summarise your assets and indicate in the list whether you own the asset solely, jointly, etc.

Include a general estimate of value.

### Real Estate:

\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

### Motor Vehicle(s):

\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

### Bank accounts, share portfolio:

\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

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Life Insurance:

\_\_\_\_\_ \$ \_\_\_\_\_

Specific Items you wish to give, eg. Paintings, jewellery, etc.

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

Monetary, legacies, to:

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

## Beneficiaries

Include the names of any person you wish to leave part of your estate to starting with your partner. Please indicate relationship whether married / de facto / same sex partner:

Name: \_\_\_\_\_

Children:

\_\_\_\_\_ Age \_\_\_\_\_

\_\_\_\_\_ Age \_\_\_\_\_

\_\_\_\_\_ Age \_\_\_\_\_

\_\_\_\_\_ Age \_\_\_\_\_

## *Will Preparation Checklist*

Charities:

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### **Executors**

This is an important role. Name the person or persons you wish to appoint to administer your estate. You may wish to name more than one executor to act jointly or severally:

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Appoint a substitute executor

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### **Guardian for special needs or minor children**

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### **Pets**

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### **Safe Custody**

We offer safe custody storage for original Wills

Please indicate if you wish to take advantage of this free service:    Yes    No

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