



Your Will Instructions – please complete

Your details

- Full Name:
- Date of Birth:
- Occupation:
- Marital status (e.g married, de facto, single, separated, divorced):
- Contact Phone Numbers:
- Email address:
- Address:

Executors / Trustees

- Your Executors & Trustees – (the persons who will look after your belongings and distribute your assets after you are gone). We suggest you select people who you trust (e.g Mum, Dad, Brother, Sister, Partner, Trusted Friend).
- Full Name of Trustee/Executor 1:
 - Relationship to you:
- Full Name of Trustee/Executor 2 (you don't have to have more than 1 at a time):
 - Relationship to you:
- Full name of Backup Trustee/Executor (recommended):
 - Relationship to you:

Gifts & Beneficiaries

- Would you like to give any **specific gifts** to certain people i.e. (jewellery, sentimental item)? Yes / No
- Details of gift(s):
- Do you have **children**? Yes / No
 - If yes please state full names and ages for **all** of your children (use an additional sheet if required)
- Would you like to leave any **money** to certain **people** or **charities**? Yes / No
 - Full name details and amount:

- What **significant assets** do you own (if any, eg such as house, car, jewellery, kiwisaver)

(use an additional sheet if required)

- What **debts** do you have (if any, eg credit cards, money owed to parents, hire purchase contracts, car finance)

(use an additional sheet if required)

- **Who would you like to leave the rest of your assets to?** (your residue). For example your partner, children, your parents jointly, or equally between your brothers and sisters.

Guardianship

- Who would you like to appoint to look after your children when you and the children's other parent are gone (Guardian)? Full names of Guardians:

Planning on marriage

- Are you engaged? Yes / No (Wills are revoked upon marriage)

Burial wishes

- Do you wish to be: Buried / Cremated / No Preference (highlight one)

Family Trusts & Companies

- Please provide full details of all trusts and companies that you are associated with:

Any other comments / queries you may have or think we should know: