

WILLS INSTRUCTION SHEET

Names and Details - Clients

(and Husband / or Wife partner as applicable for instructions for joint wills)

Full Name:
Address:
Phone No.:
Occupation:

Full Name:
Address:
Phone No.:
Occupation:

Details of Proposed Executor/s

We recommend appointing 2 executors

Full Name:
Address:
Relationship

Full Name:
Address:
Relationship

Details of Guardians (if applicable for infant children)

Name:
Address:
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Division of Estate

Beneficiaries - detail full names, relationship (if any)to you, address and occupation etc.

** detail assets to be given to who and or in what shares*

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Special Gifts / Clauses / Provisions

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Special Assets & Trusts

please detail any trusts and companies you control or have interests in and give us copies of any trust deeds and set out all business interests (company shareholdings, business partnerships etc)

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Details for Enduring Powers of Attorney (if applicable)

It is generally recommended that you appoint each other and in event of your deaths then the executors be appointed as the attorneys

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Costs

For basic Wills (if one only) \$450 plus GST and disbursements and title searches
If 2 Wills (husband and wife) \$750 (total) plus GST and disbursements and title searches

For special Wills involving family trusts and reviewing we will quote on after initial instructions but generally add at least \$300 to review family trusts. And link to Wills

Enduring Powers of Attorney
\$ 250 plus GST (if only 1)
\$ 300 plus GST (total for both)