

WILL INSTRUCTION SHEET

Names and Details - Clients

(complete 2 separately for Husband / or Wife / partner if applicable)

Full Name:
Address:
Phone No mobile:
email:
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:
.....

Division of Estate

*Beneficiaries - detail full names, relationship (if any) to you, address and occupation etc.
and detail assets to be given to who and or in what shares*

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

Special Gifts / Clauses / Provisions

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

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)

.....

.....

.....

.....

.....

.....

.....

.....

Details for Enduring Powers of Attorney *(if required and or requested)*

It is generally recommended that you appoint each other (if married or partners) and in event of your deaths then the executors be appointed as the attorneys

.....

.....

.....

.....

.....

.....

Will fees

Standard

For single Will (if one only)

\$500 plus GST

2 Wills (if husband and wife)

\$800 plus GST (inc for both together)

Non Standard and Complex Wills

for Wills involving family trusts add an additional \$500, subject to complexity, we will advise you first of the cost

If also requested

Enduring Powers of Attorney \$250 plus GST

\$400 plus GST (if for 2 people - total)

When completed

mail to us or scan and email to Mark at mark.kurtze@lawsoft.com.au