

Wills Instruction Checklist

Fill in all the sections to the best of your ability

Personal Details:

1. Surname: _____
2. All given names: _____
3. Are you known by any other name? _____
4. Address: _____

5. Telephone (home): _____ (work / cell): _____
6. Date of birth: _____
7. Marital status: _____

Children:

Child 1

Name: _____ DOB: _____
Name of other parent: _____
Who does child currently live with? _____

Child 2

Name: _____ DOB: _____
Name of other parent: _____
Who does child currently live with? _____

Child 3

Name: _____ DOB: _____
Name of other parent: _____
Who does child currently live with? _____

Any Previous Marriages / Long Standing Relationships?

Details of any court orders or agreements where you are required to pay child or spousal support and maintain life insurance:

Executors and Trustees:

You must nominate a person to act as the executor and trustee of your estate. Please make careful consideration of whom you nominate. The executor will be responsible for distributing your property. You may nominate more than one executor.

Executor/ Trustee One

- 1. Full name: _____
- 2. Address: _____
- 3. Age: _____ Relationship with you: _____

Executor/ Trustee Two

- 1. Full name: _____
- 2. Address: _____
- 3. Age: _____ Relationship with you: _____

Alternative Executor and Trustee:

- 1. Full name: _____
- 2. Address: _____
- 3. Age: _____ Relationship with you: _____

List all Beneficiaries:

Beneficiary One

1. Full name: _____

2. Address: _____

3. Age: _____ Relationship with you: _____

Beneficiary Two

1. Full name: _____

2. Address: _____

3. Age: _____ Relationship with you: _____

Beneficiary Three

1. Full name: _____

2. Address: _____

3. Age: _____ Relationship with you: _____

Beneficiary Four

1. Full name: _____

2. Address: _____

3. Age: _____ Relationship with you: _____

Specific Gifts (Bequests):

If you want to make specific gifts in your will, please answer the following. For example, you may want a specific beneficiary to retain a particular item of yours. Attach a separate sheet if required.

Item 1

Item: _____

2. Beneficiary: _____

3. Alternative beneficiary: _____

Item 2

1. Item: _____

2. Beneficiary: _____

3. Alternative beneficiary: _____

Item 3

1. Item: _____

2. Beneficiary: _____

3. Alternative beneficiary: _____

Item 4

1. Item: _____

2. Beneficiary: _____

3. Alternative beneficiary: _____

Property & Place of Residence:

Do you own your own home? If yes, where and with whom do you own it?

Residuary Estate:

The remainder of any property held by you excluding the place of residence

1. Beneficiaries? _____

2. If the beneficiaries are children, at what age(s) are they to receive their interest?

What is the % division between them? _____

4. Alternative beneficiaries:

