

## Will Instruction Form

This form is not a will

Level 2, Market City  
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Please fill out this form. If you are unsure of the answers for any of the questions or if you have any questions about what you should include in your will or how your will is going to operate, please contact one of the lawyers at Cornerstone Legal to discuss.

(Please use full names and ensure that the address of all persons named are included on this form).

### Personal Details

Your surname	Given name(s)	Age	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Address	Suburb/town	Postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Occupation	<input type="text"/>		
Home telephone	Work	Mobile	E-mail
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Partner/Spouse Details (if appropriate)

Surname	Given name(s)	Age
<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	Suburb/town	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Occupation	<input type="text"/>	

**Q1 Do you wish to be buried or cremated?**

Buried     Cremated

**Q2 Full name and address of Executor (person who carries out the instructions in your will after your death – either your spouse, your child(ren), a friend or a trusted professional adviser).**


**Q3 Full name and address of Default Executor if the above named Executor predeceases you (either one or two persons)**

***First Default Executor***

Full name

Address

***Second Default Executor***

Full name

Address

**Q4 Will you leave all property to your spouse?**

No – provide details     Yes – go to Q5

Please provide full name and address details of beneficiaries if your spouse is not your sole beneficiary:

Full name(s)	Address
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

**Q5 If your spouse pre-deceases you, is all your property to be split equally between your children?**

No – see a) below and give details    Yes  see b) below and give **FULL** name(s) & age(s) of children

a) Details of alternative beneficiaries and percentage of estate to be gifted


b) Details of children

<b>Full Name</b>	<b>Age</b>

**Q6 If any of your children pre-decease you, is their share split equally between their children (i.e. your grandchildren), if any?**

No - provide details     Yes – go to Q7


**Q7 Do you wish to leave any specific gifts to a particular person / organisation?**

No- go to Q8       Yes – give details

Give full name(s) and address or relationship to you of beneficiaries and describe gift or cash value

<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>

**Q8 Do you have any children under the age of 18?**

No – go to Q10       Yes – see below

**Who will be the guardians of your children under the age of 18 if both you and your spouse die?**

The guardian will make decisions in relation to the care of your children (and may also have day-to-day care of them) but cannot be forced into this position. It would be prudent to obtain their consent prior to naming them in your will.

Full name(s)

Address or relationship to you

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

**Q9 Any money left to an infant beneficiary must be held in a testamentary trust, to be used for the child(ren)'s benefit (i.e. living and education expenses) until they reach the age of majority. Do you wish such Trust to operate until age 21?**

Yes       No – please specify age \_\_\_\_\_

**Q10 Do you conduct a private company and / or Family Discretionary Trust?**

No – g to Q12       Yes – give details

**Full name of the Trust / Company:**

**\*\*Note: Please forward a copy of the Schedule (attached to the Trust Deed) together with this Will Instruction Sheet for our perusal prior to your appointment with us.\*\***

**Q12 Are you a member of a Self Managed Super Fund?**

No – go to Q13       Yes – give details

Full name of Self Managed Super Fund

**Q13 Is there anything else you would like to include in your Will? Please provide details.**
