

Print this checklist out for convenience and gather the information before you start online.

Will maker details

- ☐ Full name.
- ☐ Other names (if applicable).
- ☐ Residential address.
- ☐ Occupation.
- ☐ Whether Will is to stay valid if will maker marries.

- ☐ Choose description which best describes executor:
 - appointing a sole executor, or
 - appointing more than 1 executor
- ☐ Full name, address and occupation of executor(s)
- ☐ Whether executor is either:
 - a person over 18 years old, or
 - a licensed trustee company of a public trustee.
- ☐ If there is to be an alternative executor, then:
 - full name.
 - whether alternative executor is a person over 18 years old or a company
- ☐ Whether executor has power to:
 - quarantine superannuation death benefits for the benefit of death benefit dependents.
 - adjust the entitlements of beneficiaries.
 - distribute the share of a Primary Beneficiary directly to them or another beneficiary or trust rather than into a testamentary discretionary trust.
- ☐ If an Umpire is appointed to decide on any matter where a unanimous decision cannot be reached by executors, trustees, or appointors, then:
 - full name.
 - address.
- ☐ If a professional advisor is to be appointed to give advice to the executor(s) or trustees, then:
 - appoint maximum of 4 professional advisors.
 - appointor(s) full name.
 - organisation's name.
 - position of appointor(s).
 - appointor(s) address.

- gift my residuary estate to more than 1 person in equal shares.
- gift my residuary estate to more than 1 person in unequal shares.

- ☐ Details of Residual Beneficiary:
- full name.
 - address.
 - alternative residual beneficiary (if any).
- ☐ If any person does not survive to become Primary Beneficiary, whether the gift is to pass to their children in substitution.
- ☐ Whether second alternative beneficiary is to be appointed.

Guardians

- ☐ If guardian(s) are to be appointed to look after children (under 18 years old):
- appoint maximum of 2 guardians.
 - full name of guardian(s).
 - residential address.

Funeral directions

- ☐ If applicable, choose directions for funeral arrangements:
- burial.
 - cremation.

Other Trusts

- ☐ Whether beneficiary is to have the right to live in a specific property (right of residence trust).
- ☐ Whether a protected trust in a specific asset or part of the estate is to be created for a beneficiary.
- ☐ Whether a life interest in a specific asset or part of the estate is to be given to a beneficiary.

Mirror Will

Mirror Wills refer to Wills of a husband and wife (or a de facto couple) which largely mirror one another. This means the key aspects of each Will are similar.

- ☐ If you wish to create a Will which mirrors a prior order, we will pre-populate your answers for your second order to insert:
- the name and address of the second will maker, and
 - the name and details of the second will maker’s spouse as sole executor, guardian and sole residual beneficiary.

Notes

Notes

Notes

Notes

Notes