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| --- | --- |
|  | **Information required to prepare your WILL** |

**Checklist to assist you in creating a legal will**

It is important to ensure that you have a WILL so that your wishes can be carried out. The following checklist provide guidance as to the information that you will need to provide to enable us to prepare your will

Testator/Testatrix (is the person who is making the will) (testator = male testatrix = female)

|  |  |
| --- | --- |
| Full Name | Residential Address (in full) |
|  |  |

Spouse (Married or Defacto – also Executor)

|  |  |
| --- | --- |
| Full Name | Residential Address (in full) |
|  |  |

Children

|  |  |  |
| --- | --- | --- |
| Full Name | Residential Address (in full) | Age of control of Estate (eg. 18, 21 or other years) |
|  |  |  |
|  |  |  |
|  |  |  |

Substitute Executor (if spouse refuses, is unable, is unwilling or dies)

|  |  |
| --- | --- |
| Full Name | Residential Address (in full) |
|  |  |

Specific Gifts

|  |  |
| --- | --- |
| Full Name | Description of Gift(s)If money, specify exact amount, currency and account details e.g. AUD $100.00 from John Smith Savings Account No. 123456) |
|  |  |
|  |  |
|  |  |
|  |  |

Testator/Testatrix Wishes

|  |  |  |
| --- | --- | --- |
| Disposal of body(e.g. burial or cremation | Religious rites to be followed (e.g. none or identify religion) | Organ Donation(e.g. no organ donation, all organs or all organs except for) |
|  |  |  |

Guardian/s for Infant Children

|  |  |
| --- | --- |
| Full Name | Residential Address (in full) |
|  |  |