

Strictly Confidential

INSTRUCTIONS FOR PREPARATION OF WILL

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	Name 2:			
	Address 2:			
	Occupation 2:			
	Relationship 2:			
	<p><i>Note: A beneficiary, relative, friend, accountant, solicitor, financial adviser, child over 18 or a number of them or a trustee company can be named as executors. The executor is the person who administers your estate and gives effect to the Will. He/she has the help of accountants and solicitors if necessary. It is a position of trust and in most estates no one of great commercial experience is required.</i></p>			
13	Children (natural or adopted - please indicate if any child is of a previous marriage)			
	Full Name	Surname	Address	Date of Birth
14	List anyone other than a spouse or child specified above who is financially dependent upon you			
	Name	Address	Occupation	Relationship
	<p><i>Note: various relatives or defacto partners may have a right to claim under the Inheritance Act. Financial dependency is a relevant consideration.</i></p>			
15	Specific Gifts (if any) - describe each gift carefully (eg shares in particular companies, proceeds of bank accounts in particular accounts, jewellery by insurance description, car by make and model)			

19	ENDURING POWER OF ATTORNEY
	Full name and address of attorney 1:
	Full name and address of attorney 2:
	Full name and address of substitute attorney 1:
	Full name and address of substitute attorney 2:
20	ENDURING POWER OF GUARDIANSHIP
	Full name and address of guardian 1:
	Full name and address of guardian 2:
	Full name and address of substitute guardian 1:
	Full name and address of substitute guardian 2:
21	If you have any interest in the following then you may need specific advice
	(a) Family Trusts or Unit Trusts (b) Superannuation (c) A Business or partnership (d) Insurance Policies <i>If you control a discretionary (family trust) please provide us with copies of trust documents</i>
22	Please note that the following property does not pass under a will
	(a) Property including bank accounts or deposits owned jointly with someone else (b) Superannuation moneys where the Trustee of the fund has a discretion to pay various dependents or relatives. (b) Assets of a family trust (d) Insurance policies on the life of the deceased which are owned by another. (e) The assets of companies (including private companies) Also interests in a business or partnership and shares in private companies may pass according to an agreement.
23	If there are any other matters that you wish to address (including forming a testamentary trust), please contact us

*Please telephone or write to us with any questions you may have.
This instruction form is only preliminary and intended as a guide.
It is not a Will, it is the basis on which we can consider your position and draft your Will.*

If you have any questions, please contact Hugh Cahill, Paul Kordic or Heather Williams on 9389 3999