



MackeyWales

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WILLS INSTRUCTION SHEET

A Will provides for an Executor to manage your estate, appointment of guardians for any minor children and the distribution of your estate to your beneficiaries on death. You can give specific items such as jewellery or certain amounts of money to one or more individuals or charities. You can then provide for the disbursement of the remainder of your estate, after payment of debts and the specific gifts.

This instruction sheet will assist you with the preparation of your Will and help you to identify issues associated with it.

1. **CLIENT 1 FULL NAME:**

Occupation: **Date of Birth:**.....

2. **CLIENT 2 FULL NAME:**

3.

Occupation: **Date of Birth:**.....

3. **ADDRESS: (Residential)**.....

.....

(Postal).....

Contacts: (H) **(W)**

Fax: **Mobile:**

Email:

4. **ASSETS:-**

Real Property:

OWNER	ADDRESS

Super:

FUND	OWNER	BENEFICIARY

Business Structures: eg. Companies, Trusts.

FULL NAME & A.C.N.	CONSTITUTION/DEED HELD BY?

Life Insurance:

INSURER	OWNER	BENEFICIARY

Specific Gifts: eg. money, jewellery

ITEM	BENEFICIARY

5. LIABILITIES

LENDER	SECURITY

6. ACCOUNTANT DETAILS:

.....
.....
.....

7. FINANCIAL PLANNER/BUSINESS ADVISER DETAILS:

.....
.....

8. EXECUTORS (Full Name/Relationship to You):-

(1)
(2)
(3)

9. BENEFICIARIES (Full Name/Relationship to You):-

(1)
(2)
(3)
(4)
(5)

10. GUARDIANS (IF APPLICABLE) (Full Name):-

(1)
(2)

How do you prefer that they make their decisions?:

Jointly/successively
(*circle appropriate decision)

11. PREVIOUS SPOUSE AND OTHER CHILDREN (if applicable):-

.....
.....

12. WHERE DID YOU HEAR ABOUT MACKEY & WALES?

.....

13. ANY OTHER DIRECTIONS:-

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MACKEY WALES LAW

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