

DATAFORM INFORMATION FOR WILLS

PREVIOUS WILL: YES / NO

If yes where is it held? HERE OR _____

PERSONAL DETAILS

Full name: _____

Town/City: _____ Occupation: _____

Email address: _____

Relationship status:

MARRIED / FIANCE / PARTNER / SEPARATED / DIVORCED / NOT IN A RELATIONSHIP

FAMILY TREE

Current Spouse/Partner (if any) _____

Children (if any) _____ Age _____

_____ Age _____

_____ Age _____

_____ Age _____

_____ Age _____

Step-Children (if any)

1. _____ Age _____ Other Parent: _____

2. _____ Age _____ Other Parent: _____

3. _____ Age _____ Other Parent: _____

4. _____ Age _____ Other Parent: _____

5. _____ Age _____ Other Parent: _____

EXECUTOR(S) & TRUSTEE(S)

Trustee 1 full name _____

Relationship _____

Trustee 2 full name _____

Relationship _____

Back up Trustee(s)? **YES / NO**

Back up Trustee full name _____

Relationship _____

Back up Trustee 2 full name _____

Relationship _____

GUARDIAN(S) OF CHILDREN (IF ANY)

Guardian 1 full name _____

Relationship _____

Guardian 2 full name _____

Relationship _____

CHATELS – Who gets these?

1. I give the following chattels:

Item _____ to _____

Item _____ to _____

Item _____ to _____

Item _____ to _____

Item _____ to _____

2. I give **all / all the rest of** my chattels to my spouse/partner (if any).

3. I give **all / all the rest of** my chattels to my Trustee(s) to dispose of, distribute or sell at his/her/their discretion – the net sale proceeds (if any) are to be added to residuary estate.

4. I give the balance of my chattels to _____

GIFTS - Monetary

1. _____ at age 20 or 25 years

2. _____ at age 20 or 25 years

3. _____ at age 20 or 25 years

4. _____ at age 20 or 25 years

5. _____ at age 20 or 25 years

CHARITABLE GIFTS

Full name of charity	Amount

SPECIAL CLAUSES

LAW OF SURVIVORSHIP: Please note jointly owned assets pass to the survivor on death under the Law of Survivorship

DISTRIBUTION/RESIDUARY ESTATE

To surviving spouse partner _____

OR

To children (**list full names and ages**): at age 18 / 20 / 21 OR at age **25**

Name(s) of children

Full name	Age

If one of your **children** dies before you do – do you want their share of your estate to go to your **grandchildren**? **YES / NO**

If no beneficiaries as stated above then how is your residuary estate to be distributed?

Number of shares: _____

Share	Full name	Relationship	Gift over their child?
/		_____ at age _____	YES / NO
/		_____ at age _____	YES / NO
/		_____ at age _____	YES / NO
/		_____ at age _____	YES / NO
/		_____ at age _____	YES / NO

If spouse/partner or son/daughter being excluded from Will – state reasons:

CONTEMPLATION OF MARRIAGE: YES / NO

Recommend this be added if couple unmarried as wills act revokes will on marriage.

FUNERAL ARRANGEMENTS

I wish to be: **BURIED** or **CREMATED**

Other funeral instructions:

LIST OF MAIN ASSETS OWNED BY WILL MAKER

Property: Main House Property

Address of Property	Owner(s) name	Ownership	Approximate value \$
		Joint / Tenants in Common	

Property: Second House(s) and/or Rental

Address of Property	Owner(s) name	Ownership	Approximate value \$
		Joint / Tenants in Common	
		Joint / Tenants in Common	

Bank Accounts: _____

Prepaid Funeral Company: _____

House Property: _____

Rental Property: _____

Life Insurance Company: _____

Name of Bank(s): _____

KiwiSaver Provider: _____

Trust Name: _____

Inheritance or beneficiary in any other Trust: _____

Farm/Business/Commercial: _____

Shares/Bonds/Cash: _____

FURTHER EXPLANATION OF WILL
