

Instruction Sheet

Wills and Powers of Attorney

Date ____/____/____

Will

- | | | |
|--|----------------------------------|-----------------------------------|
| <input type="checkbox"/> Husband and wife mutual wills | <input type="checkbox"/> Married | <input type="checkbox"/> De Facto |
| <input type="checkbox"/> One person will | <input type="checkbox"/> Single | <input type="checkbox"/> De Facto |

Power of Attorney

Enduring Guardianship

Name: _____

Address: _____

Postal Address As above

Occupation: _____ Date of Birth: _____

Tel: BH _____ AH _____ Fax: _____

Mobile: _____ Email: _____

WILLS

Is there an existing will?

No

Yes

If yes, Where is it located: _____

Executor

Spouse

Other

Alternate

Next Alternate

Testamentary Guardian of minor children

Name: _____

Address: _____

Specific bequests

Family Provisions Act

Below are some reasons which might be appropriate for excluding the potential claimant _____

- Provision has been made for them during my lifetime.
- There has been no contact between us for many years and there is no relationship of love and affection between us. In these circumstances any gift to them would be contrary to the nature of our relationship.
- Their circumstances are far better than the beneficiaries that I have nominated and therefore some equity is achieved by such gifts.
- They have received substantial gifts from the estate of my late spouse and her relatives.
- They will receive substantial gifts from the estate of my former spouse and her relatives.
- Other:

Beneficiaries

- Each other Spouse Other

Then

Then

Children at age 18 21 25 30

- Including children of spouse or partner
- Equally between all children;
- 1/2 to children and 1/2 to spouse's / partner's children

Then

Grandchildren at age 18 21 25 30

- Including grandchildren of spouse or partner
- Equally between all grandchildren;
- 1/2 to grandchildren and 1/2 to spouse's / partner's grandchildren

Then

Other

POWER OF ATTORNEY

Attorney/s to be the same as the Executors in will Joint Several

Alternate attorney/s to be the same as Alternates in will Joint Several

Spouse And Other Joint Several

Other

Alternate Joint Several

ENDURING GUARDIANSHIP

Guardian/s to be the same as the Executors in will Joint Several

Alternate guardian/s to be the same as Alternates in will Joint Several

Spouse and other Joint Several

Other

Alternate Joint Several

Limitations / Notes:
