

Will Questionnaire

To assist us in giving you advice and preparing your Will, could you please let us know the following information:

Personal information

Notes

Full name:

Include middle names

Address:

Occupation:

Mobile phone:

Home phone:

Email:

Do you have earlier will?

YES

NO

Do you have a trust?

YES

NO

If you have a family trust, you may wish to simply leave your assets to the trust and provide guidance to the remaining trustees about how the trust assets should be distributed.

Relationship information

Is this will made in contemplation of marriage?

YES

NO

Relationship status:

E.g. single, married, de facto relationship

Partner full name:

Address:

Occupation:

Existing relationship property agreement:

Including a contracting out agreement ("pre-nup") or property sharing agreement. If you are not sure, do not hesitate to get in touch.

Burial / Cremation and directions

Burial or cremation:

Write one option in the space provided.

Specific directions:

Include a location of your burial or place you wish your ashes to be scattered or stored (you can even include instructions to have your ashes compressed into a diamond or put in a biodegradable urn and placed under a tree). Provide as much detail as you like here. Your family will otherwise have decision-making power over your burial / cremation, or failing that the executor of your will.

Executor(s) / Trustee(s)

Full name:

Include middle names.

Address:

The executor is the person(s) who would administer and distribute your estate when you die. This can also be a person you wish to benefit under your will. It is prudent to appoint two people or in a situation where you wish to appoint your husband/wife/partner consider whether to appoint a substitution executor in case they die before you.

Occupation:

Relationship to you:

Full name:

The trustee is often the same person(s) as the executor and is the person(s) responsible for holding assets on behalf of younger beneficiaries who may need to reach a certain age before receiving inheritance.

Address:

Occupation:

Relationship to you:

Would you like your executors to act jointly or jointly and severally?

Jointly

Jointly and severally

If you have named more than one executor or trustee, you can instruct them to make decisions unanimously (jointly) or individually and unanimously (jointly and severally).

Children / Dependents

Do you have any children or dependents? **YES** **NO**

Full name:

Date of birth:

Full name:

Date of birth:

Full name:

Date of birth:

The age your children take an interest in your estate:

Appointment of guardian of infant children

Full name:

A guardian is a person appointed to oversee the general welfare, maintenance and education of children under the age of 18 years. The guardian will not necessarily have to look after the day to day care of your children and may need to obtain a parenting order to do this.

Address:

Occupation:

Relationship to you:

With specific instructions on education and use of your home, you should keep in mind that the Guardian will need to communicate with your executor/trustee to obtain funds for the benefit of your children.

Specific instructions:

Gift of personal chattels

Full Name: _____

Address: _____

Occupation: _____

Personal chattels are items of your personal property excluding land. You may wish to leave these to your spouse, partner or a close family member so that they can distribute them as they see fit.

Personal chattels include all vehicles and boats, garden effects, furniture, domestic animals, linen, china, glass, books, pictures, prints, jewellery, household or personal ornaments, musical and scientific instruments and apparatus, wines, liquors, and consumables.

List any overseas assets below

Your New Zealand will can deal with movable assets (cash, shares, etc.) located anywhere in the world, and New Zealand based immovable assets (real estate). If you have real estate in other parts of the world it can be included in your will, but may be more cost effective to have a will prepared in the jurisdiction the property in located.

Life insurance policies

Do you have a life insurance policy?

YES

NO

Details: _____

If you have a life insurance policy that specifies beneficiaries, the policy will not form part of your estate and will be paid directly to the beneficiaries.

Any interests in a trust

Name of trust: _____

Nature of interest: _____

Date created: _____

List of assets: _____

Are you a trustee, settlor, appointer?

List all assets and indicate value in brackets e.g. car (\$5,000), Holiday Home (\$300,000), Term Deposit (\$20,000)

If you have more please refer to page 7

Assets

Assets (own name)	Assets (joint)
_____	_____
_____	_____
_____	_____
_____	_____

List all assets and indicate value in brackets e.g. car (\$5,000), Holiday Home (\$300,000), Term Deposit (\$20,000).

Include any intellectual property you own (e.g. trademarks).

Any assets owned jointly with someone else (e.g. real estate and bank accounts) will automatically pass to the survivor. If you are the survivor, the asset will pass as per your will.

If you have more please refer to page 7

Debts

Debts (own name)	Debts (joint)	<p>List all debts and indicate value in brackets e.g. car loan (\$5,000), mortgage (\$300,000). Any debts owned jointly with someone else (e.g. bank loans) will become the responsibility of the survivor. If you are the survivor, your estate will be responsible for repaying the debt.</p>

If you have more please refer to page 7

Domain names, websites, email accounts, and social media accounts

	<p>If you wish to, you can list all of the log in details and password for relevant online accounts. We can seal them in an envelope to be held with your will.</p>

Would you like us to attach these to your will in an envelope?

YES **NO**

Life interest

Full name:	<p>A life interest is giving someone the right to use your assets for the remainder of that person's life (or until they re-partner). You will need to state who will receive the life interest, the asset it relates to (e.g. your family home) and when they lose the life interest (e.g. on remarriage or death). That person will need to pay for rates, insurance, and maintenance. E.g. I would like my wife to have a life interest in my 1/2 share of the family home for the remainder of her life, and upon her death or if she is to remarry I would like my 1/2 to go to my children.</p> <p>Note: you cannot leave a life interest in a property owned jointly with another person as the assets will automatically transfer to that person in full, by way of survivorship.</p>
Address:	
Occupation:	
Details of parts of estate left on life interest:	

Specific gifts or legacies

Item description:	<p>Describe in detail the gifts you want to leave so there is no doubt. E.g. My Grandfather's Model blue Rolls Royce toy car to my sister Janice.</p> <p>You can also give cash gift here, in which case you could consider leaving a share of residue (rather than a specific sum) to make sure remaining beneficiaries are not disadvantaged by a will maker's change of circumstances at the time of death.</p>
Full name:	
Address:	
Occupation:	

If you have more please refer to page 7

Residue of estate

Spouse/partner: **YES** **NO**

Parent(s): **YES** **NO**

Children: **YES** **NO**

Other: **YES** **NO**

Full name: _____

Address: _____

Occupation: _____

Other Instructions: _____

If any beneficiary dies before you, what would you like to happen to their _____

After specific gifts have been made, the balance of your estate is called the residue. You can leave the residue to one person or to more than one people in equal or unequal shares.

If you don't know who you would like to leave your residue to and you don't have any family you are obliged to care for, you could consider leaving the residue to a charity or foundation, such as the Wakatipu Community Foundation.

You can also include a provision that, for example, if your children have died before you, their share is left to their children (your grandchildren).

Are you leaving any of your family out of your will?

Full name: _____

Relationship: _____

Your reason for doing so: _____

Family members left out of a will or dealt with inadequately may be entitled to bring a claim before court seeking a larger share.

Are you leaving your children unequal shares in your assets?

Full name: _____

Your reason for doing so: _____

Parents are seen to have a legal obligation to provide for their children on death. If you are treating your children unequally, the child/ children receiving less may have a claim against your estate.

Are you leaving your spouse, civil union partner or de facto partner a share less than 50% in your property which you own together or has been acquired for common use?

Your reason for doing so: _____

Your spouse/partner may be able to make a claim under relationship property legislation, if you don't provide for them adequately under your will.

Do you have any power to appoint beneficiaries or trustees of a trust or directors of a company under any trust, estate or other document which can be exercised under your will?

Name of trust or company: _____

Date of Trust Deed: _____

Nature of Powers: _____

Transfer powers to: _____

If you hold the power to appoint trustees and you wish to appoint a trustee to replace you, please provide the full name, occupation and place of residence of that person. As an alternative to exercising this power under your will, you may wish to specify in your will whom you wish the power to be transferred.

Do you want your executors to have power to carry on any business you have an interest in, or want to make any special provisions for the business?

Name of business: _____

Type of business: _____

Specific risks to consider: _____

If you are a director of a company, you will need to consider how you want the company to be run after your death.

Have you promised to leave anyone any of your property by will?

Full name _____

Address _____

Occupation: _____

Which property? _____

It is important that any promises are recognised, as the person you made the promise to may otherwise have a claim against your estate.

Do you want to have an Enduring Power of Attorney in relation to welfare or property?

YES NO

If you tick YES we will contact you to discuss.

An Enduring Power of Attorney allows you to appoint a person(s) to make decisions relating to your welfare/health or your property/assets in the event you lose your mental capacity. This is not just for elderly people, think what would happen if you fell off your bike and hit your head.

Assets *continued*

Assets (own name)	Assets (joint)

Debts *continued*

Debt (own name)	Debt (joint)

Specific gifts or legacies *continued*

Item description:

Full name:

Address

Occupation

Item description:

Full name:

Address

Occupation