



BEFORE YOUR WILL INTERVIEW – THINGS TO THINK ABOUT

Please consider the following things before you come to your Will interview with us:

A. THE EXECUTOR

- Who will be your Executor?
- Do you want to name more than one person to be joint Executors?
- Who will be your back-up (substitute) Executor?

B. YOUR PROPERTY

- Do you have specific items of property that you want to give to specific people?
- For the remainder of your property - who will receive it, and in what shares?
- If someone you are giving property to dies before you, what happens to their share?
- Are you leaving anything to a charity?
- Do you own any property jointly?

C. YOUR CHILDREN (IF ANY)

- If you have children aged under 18, who do you want to be their Guardian(s)?

E. SPECIAL REQUESTS

- Any requests about your funeral or the disposal of your body?

F. SUPER AND INSURANCE

- Will your super/insurance benefits flow to your estate after your die, or to nominated beneficiaries?

NOTE: We will discuss a range of issues with you. The purpose of this list is to prompt you to gather and bring information to the meeting. It is not intended to be a complete list of all issues that may be relevant to your Will.

NEED MORE INFORMATION?

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