**Initial information for your Will**

**FAMILY**

1. **Full name:** ……………………………………………………………………………………………...

**Occupation:** …………………………………………………………………………………………...

**Town of residence:** …………………………………………………………………………………

1. **Executors/Trustees full names:** (We recommend two people, or one with a second person as a back-up)
2. ……………………………………………………………………………………………………………
3. ……………………………………………………………………………………………………………
4. **Partner/ Spouse full name:** …………………………………………………………….

**Length of relationship:** ……………….…………. (years)

1. **Children’s full names and age:** (if naming step-children, this should be noted)
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3. ……………………………………………………………………………………………………………
4. ……………………………………………………………………………………………………………
5. ……………………………………………………………………………………………………………
6. ……………………………………………………………………………………………………………
7. **Testamentary guardians for children under 17 years of age:** (We recommend two people, or one with a second person as a back up)
8. ……………………………………………………………………………………………………..
9. ……………………………………………………………………………………………………..

**PROPERTY**

1. **Assets (and Liabilities):** (Include any properties/land, bank deposits, Kiwisaver schemes, shares, other investments, business assets, classic vehicles, funeral fund etc)

Asset estimated value (include any debt owing)

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Life Policies amount of cover

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Debts owed to you by whom

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1. **Specific gifts:** (Generally to family, close friends or charities)

Examples: $5,000 to each grandchild, $5,000 to the Otago Rescue Helicopter Trust, Forgiving all or part of a debt owed to you, my Harley Davidson to my lawyer.

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1. **Estate Beneficiaries:** (the people who are to receive your estate after bills are paid, and specific gifts distributed)
2. To my partner/spouse if they survive me **(yes / no)**
3. To my children equally **(yes / no)**
4. If no to the above, other beneficiaries and shares

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1. **What is to happen if a beneficiary dies before you –** do you want their share to go to;
2. Their children (your grandchildren), **(yes / no)**
3. Their spouse (your in-law), **(yes / no)**
4. Just go to the other surviving beneficiaries **(yes / no)**
5. Other:…………………………………………………………………………………………………

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1. **Any other thoughts, ideas or questions?**

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**Note:** This form is not intended to represent a Will, or even include the full details of what you would like your Will to say. It is simply intended to assist you and us when we first meet to discuss your Will.