



ESTATE PLANNING QUESTIONNAIRE

PERSONAL DETAILS

The Willmaker

Full name

Other names

(in which you hold assets)

Date of birth

Address

Occupation

Prior wills

Date made

Where is the will kept?

Was it made as a mutual will with your spouse?

**Current spouse
or partner**

Full Name

Date of birth

Address

Occupation

Date of marriage
(if applicable)

Former spouses

Full name

Address

Occupation

Date of divorce

Date of property settlement
(if applicable)

PERSONAL DETAILS, *Continued*

**Former spouses,
*Continued***

Full name

Address

Occupation

Date of divorce

Date of property settlement
(if applicable)

ESTATE PLANNING QUESTIONNAIRE

**Natural or
adopted children** **Full name**
Date of birth

Full name
Date of birth

Full name
Date of birth

Full name
Date of birth

**Step-children or
foster children** **Full name**
Date of birth
Address

Full name
Date of birth
Address

Full name
Date of birth
Address

Full name
Date of birth
Address

PERSONAL DETAILS, *Continued*

**Natural or
adopted
grandchildren** **Full name**
Date of birth
Parents

Full name
Date of birth
Parents

ESTATE PLANNING QUESTIONNAIRE

Full name

Date of birth

Parents

Full name

Date of birth

Parents

**Other
beneficiaries**

Full name

Date of birth

Address

Occupation

Relationship

Full name

Date of birth

Address

Occupation

Relationship

Full name

Date of birth

Address

Occupation

Relationship

PERSONAL DETAILS, *Continued*

Changes

Do you plan to marry soon?

Do you plan to have a child soon?

Special needs

Are any of the people mentioned so far:
Disabled?

Bankrupt or subject to administration arrangements?

About to get divorced?

In an occupation with high financial risks?

ESTATE PLANNING QUESTIONNAIRE

YOURS ASSETS

Land

Address

Title details

Are you a joint tenant or a tenant-in-common?

Is the purchase subject to a terms contract?

Is the property subject to a mortgage?

(Which financial institution and how much is owing)

Address

Title details

Are you a joint tenant or a tenant-in-common?

Is the purchase subject to a terms contract?

Is the property subject to a mortgage?

(Which financial institution and how much is owing)

Antiques, paintings etc.

Details:

.....

Shares in a public Company name

Company

A.C.N

Number of shares

Registry

YOURS ASSETS, *Continued*

Shares in a public company,

Company name

A.C.N.

Continued

Number of shares

Registry

Shares in a

Include any companies that are trustees for trusts controlled by you.

private company

Company name

A.C.N.

Number of shares

(and type if not ordinary)

Are you a director?

Type of business

ESTATE PLANNING QUESTIONNAIRE

Company name

A.C.N.

Number of shares
(and type if not ordinary)

Are you a director?

Type of business

Units in a unit

Trust name

Trust

Date Trust established

Number of units

Trust name

Date Trust established

Number of units

**Debts owed to
you**

Owed by whom?

Amount

Owed by whom?

Amount

YOURS ASSETS, *Continued*

Expected

Name of donor

inheritances

Nature of inheritance

Remainder

Name of donor

interests

Nature of assets

Name of life interest holder

Foreign assets

Details:

**Entitlements to
trust capital**

Trust name

Date the trust will end

Trusts

Trust name

Trust
(including A.C.N. if applicable)

Beneficiaries

Appointor

ESTATE PLANNING QUESTIONNAIRE

Trust name

Trustee
(including A.C.N. if applicable)

Beneficiaries

Appointor

Please provide a copy of the trust deed(s).

Life insurance

Policy

Owner

Amount

Have you nominated a beneficiary?

Policy

Owner

Amount

Have you nominated a beneficiary?

YOURS ASSETS, *Continued*

Superannuation

Fund

Trustee

Credit in member's account

Directions to trustee

Life policy

Owner

Amount

Have you nominated a beneficiary?

Fund

Trustee

Credit in member's account

Directions to trustee

Life policy

Owner

Amount

Have you nominated a beneficiary?

Please provide copies of the trust deed(s) and existing directions to the trustee(s).

ESTATE PLANNING QUESTIONNAIRE

Subject to liabilities Are any of these assets subject to mortgages, securities, charges or other obligations?

YOUR LIABILITIES

Debts owned **Owned to whom?**

by you Amount

Owned to whom?

Amount

Please provide a copy of the documents creating the debt(s).

YOUR LIABILITIES, *Continued*

Personal guarantees **Given to whom?**

Given by you Securing what obligation?

Given to whom?

Securing what obligation?

Given to whom?

Securing what obligation?

Given to whom?

Securing what obligation?

Please provide a copy of the guarantee agreements(s).

Hire purchase What goods?

Obligations Amount owed

When will the purchase be completed?

Please provide a copy of the hire purchase agreement.

Partnership **Partnership name**

Interests Partnership share

Partnership name

Partnership share

Please provide a copy of the partnership deed(s).

ESTATE PLANNING QUESTIONNAIRE

Other liabilities

Owed to whom?

Amount

Securing what obligation?

Owed to whom?

Amount

Securing what obligation?

Please provide a copy of documents creating these obligations.

APPOINTMENTS

Executor/Trustee

Full name

Address

Occupation

Relationship

Full name

Address

Occupation

Relationship

Do you wish to pay your executors for their services?

Guardian for your Children

Name

Address

Relationship

Name

Address

Relationship

Appointor of trusts controlled by you

Trust name

Who holds the power of appointment?

Who will receive the power of appointment?

Trust name

Who holds the power of appointment?

Who will receive the power of appointment?

ESTATE PLANNING QUESTIONNAIRE

Attorney **Name**
(enduring) Address
 Relationship

 Name
 Address
 Relationship

APPOINTMENTS, *Continued*

Attorney **Name**
(medical) Address
 Relationship

 Name
 Address
 Relationship

YOUR WISHES

Specific gifts **Beneficiary**
 Item/amount

 Beneficiary
 Item/amount

 Beneficiary
 Item/amount

Balance of estate **Beneficiary**
 Conditions
 (e.g. only for their lifetime)

 Beneficiary
 Conditions
 (e.g. only for their lifetime)

 Beneficiary
 Conditions
 (e.g. only for their lifetime)

ESTATE PLANNING QUESTIONNAIRE

Residue

Beneficiaries

Status of debts

Do you wish debts (such as a mortgage) on property given by your will to be paid out by the estate before the beneficiary receives it?

YOUR WISHES, *Continued*

Your body

Funeral wishes

Use of your body

(transplants, medical research, etc.)

**Disinheriting a
relative**

Name

Reason

Name

Reason
