

WILL PREPARATION CHECKLIST

Ensure:

- You have listed all names you use including any alias to avoid difficulty collecting assets.
- You have the full and proper name and address of each executor.
- You have the full name and address of each trustee if they are to differ from your executor/s.
- You have the full and proper name and relationship of each and beneficiary.
- You have considered people who may be eligible to dispute your Will and sought our advice.
- You have determined what assets will be available in your estate including jointly owned assets.
- You have checked life insurance policies and superannuation funds to determine what nominations have been made and whether they are binding or non-binding nominations.
- You have decided upon any guardian of infant children and confirmed with guardians they accept the appointment.
- You have advised the executors you intend to appoint them and obtained their approval to act.
- You have advised the trustees (if not the same as your executors) you intend to appoint them and obtained their approval to act.
- You have advised the executors and trustees where the original Will is held and the circumstances in which they are entitled to act.