



KATHERINE WILMOTT  
LEGAL LTD

CLIENT INFORMATION FOR WILLS

FULL NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

PHONE NUMBERS \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_

OCCUPATION \_\_\_\_\_

DATE OF BIRTH \_\_\_\_\_

ABOUT YOU AND YOUR FAMILY

1. PERSONAL DETAILS

What is your present marital status?

.....

What is the FULL name of your husband/wife/partner/civil union?

.....

Do you have any children? If so please detail FULL names and dates of birth.

(i) Name: .....

(ii) Name: .....

Date of birth: .....

Date of birth: .....

(iii) Name: .....

(iv) Name: .....

Date of birth: .....

Date of birth: .....

Have you been in a previous De facto relationship or marriage in the past 3 years? If so please give FULL names

Yes/No Name: .....

## WHAT DO YOU OWN?

2. Please list your assets below:

### Real Estate

Address:	Sole/Joint

### Bank Accounts:

Account Number:	Sole/Joint

### Life Insurance/Shares:

Company Name:	Sole/Joint

### Other Assets:

Description:	Sole/Joint

**WHAT YOU WOULD LIKE IN YOUR WILL**

**3. APPOINTMENT OF TRUSTEE/S**

State the FULL names, addresses and occupations of person/s who you would like to be your trustee/s (also known as executors). Please choose two trustees. Spouses usually appoint each other in the first instance, and then choose two alternatives:

(i) <i>Name:</i> .....	(ii) <i>Name:</i> .....
<i>Address:</i> .....	<i>Address:</i> .....
.....	.....
.....	.....
<i>Phone:</i> .....	<i>Phone:</i> .....
<i>Occupation:</i> .....	<i>Occupation:</i> .....
<i>Relationship to You:</i> .....	<i>Relationship to You:</i> .....

**ALTERNATIVE EXECUTOR(S) AND TRUSTEE**

(iii) <i>Name:</i> .....	(iv) <i>Name:</i> .....
<i>Address:</i> .....	<i>Address:</i> .....
.....	.....
.....	.....
<i>Phone:</i> .....	<i>Phone:</i> .....
<i>Occupation:</i> .....	<i>Occupation:</i> .....
<i>Relationship to You:</i> .....	<i>Relationship to You:</i> .....

**4. GIFTS / LEGACIES**

Do you wish to make any specific gifts (legacies) of money or chattels? **Yes / No**

If you wish to make any specific gifts of money or chattels please give a full list of names, addresses and occupations of the recipients and full details of what you wish to leave them:

GIFT: .....	<i>Name:</i> .....
	<i>Address:</i> .....
	.....
	.....
GIFT: .....	<i>Name:</i> .....
	<i>Address:</i> .....
	.....
	.....

GIFT: .....

Name: .....

Address: .....

.....

.....

GIFT: .....

Name: .....

Address: .....

.....

.....

**Digital Footprint** – You can give your trustees instructions on how you wish your online presence to be dealt with.

Do you wish to make provision for your digital footprint? **Yes / No**

**5. RESIDUAL ESTATE**

**5.1 First Beneficiaries**

Who is to receive the residue (the balance) of your estate? Usually spouses leave everything to each other in the first instance, then children, then grandchildren. (Full names please)

(i) Name: .....

(ii) Name: .....

Address: .....

Address: .....

.....

.....

.....

.....

Occupation: .....

Occupation: .....

Share: .....

Share: .....

Relationship to You: .....

Relationship to You: .....

(iii) Name: .....

(iv) Name: .....

Address: .....

Address: .....

.....

.....

.....

.....

Occupation: .....

Occupation: .....

Share: .....

Share: .....

Relationship to You: .....

Relationship to You: .....

**5.2 Second / Substitute Beneficiaries**

If any beneficiary dies before you, what would you like to happen to his or her share? (Usually this goes to the deceased's beneficiary's children.)

<i>Name:</i> .....	<i>Name:</i> .....
<i>Address:</i> .....	<i>Address:</i> .....
.....	.....
.....	.....
<i>Occupation:</i> .....	<i>Occupation:</i> .....

**5. Appointment of testamentary guardian(s)**

Do you wish to appointment testamentary guardian(s) for your children under the age of 18 years?

<i>Name:</i> .....	<i>Name:</i> .....
<i>Address:</i> .....	<i>Address:</i> .....
.....	.....
.....	.....
<i>Occupation:</i> .....	<i>Occupation:</i> .....

**6. Omissions**

If you are omitting any of your family from provision, please indicate the reasons, as family omitted may apply to the Court for provision from the estate:

.....

.....

.....

**7. FUNERAL DIRECTIONS**

Do you wish to be buried or cremated? .....

Do you have any special funeral directions?

.....

.....

Are you a Donor? If so, do you have provision on your Drivers Licence? .....

**8. Other**

Have you made any promise, whether enforceable or not, to leave property by Will? If so please give details.

.....  
.....

Do you have any power of appointment under any trust or estate or power to appoint directors, which can be exercised under your will?

.....  
.....

**9. SPECIAL PROVISIONS**

Are there any other special provisions you wish to make, for example, a life interest which allows a person to benefit from your estate for their life? **Yes / No**

.....  
.....  
.....  
.....

## **WHAT DO I DO NOW?**

10. It is imperative that you keep your personal information safe. All forms received will be held confidentially pursuant to our client/lawyer confidentiality.

Please post or drop in your form to:

Katherine Wilmott Legal Limited, 2<sup>nd</sup> Floor, 29 High Street, PO Box 156, Rangiora 7440, or

Fax to 03 260 4778, or

Email to [admin@kwlegal.nz](mailto:admin@kwlegal.nz)

When we have received the form, we will contact you.

We will then draft your Will for you. A copy will be sent to you in the mail for your approval.

When you are happy with your Will, you will need to contact our office to arrange an appointment to see your lawyer, to sign the original.

In the meantime, if you have any queries at all, please do not hesitate to telephone or email.

Please note, you will need an appointment if you wish to see your lawyer.