



WILLS & ESTATE PLANNING QUESTIONNAIRE

Your Adviser

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Section A: Client Data

It is important that you take time to complete this questionnaire as thoroughly as possible. We use this information to prepare documentation specifically for you. Please attach copy of last will if applicable. Completed forms can be sent to us via;

Email: info@craigsmith.com.au

Post: PO Box 575 FORSTER NSW 2428

Alternatively, you can bring the questionnaire to your first meeting with your Adviser.

A1 Personal details – Client 1

Title: Dr Ms Mrs Mr Other _____

FirstName: _____ Middle Name: _____ Last Name: _____

PreferredName: _____ Previous Names: _____

DOB: _____ Gender: _____ Relationship Status: _____

Country of Residency: _____ Citizenship (if NOT an Australian resident): _____

Occupation: _____

ID Type: Drivers License Passport Other _____

ID Number: _____ Place of Issue: _____ Date of Issue: _____

Address: _____ P/C: _____

Mobile: _____ Home: _____

Business hours: _____

Email: _____

Preferred Method of Contact: Phone Mobile Email

A2 Personal details – Spouse

Title: Dr Ms Mrs Mr Other _____

FirstName: _____ Middle Name: _____ Last Name: _____

PreferredName: _____ Previous Names: _____

DOB: _____ Gender: _____ Relationship Status: _____

Country of Residency: _____ Citizenship (if NOT an Australian resident): _____

Occupation: _____

ID Type: Drivers License Passport Other _____

ID Number: _____ Place of Issue: _____ Date of Issue: _____

Address: _____ P/C: _____

Mobile: _____ Home: _____ Business hours: _____

Email: _____

Preferred Method of Contact: Phone Mobile Email

A3 Children and/or Other Dependants (Current and/or Expected) – Client 1& 2

FirstName: _____ *Middle Name:* _____ *Last Name:* _____

Previous Names: _____

DOB: _____ *Gender:* _____ *Relationship Status:* _____

FirstName: _____ *Middle Name:* _____ *Last Name:* _____

Previous Names: _____

DOB: _____ *Gender:* _____ *Relationship Status:* _____

FirstName: _____ *Middle Name:* _____ *Last Name:* _____

Previous Names: _____

DOB: _____ *Gender:* _____ *Relationship Status:* _____

FirstName: _____ *Middle Name:* _____ *Last Name:* _____

Previous Names: _____

DOB: _____ *Gender:* _____ *Relationship Status:* _____

Section B: Will Instructions

- 1. Do you wish to give any specific items or make cash gifts to a specific person? If so please complete specific bequests table on page 8.**

N.B. You can give away items like a specific watch or Jewelry or specific sums of money

Client 1: Yes No **Spouse:** Yes No

- 2. The name, address and date of birth of the person/s you want to be the executor/s of your will.**

N.B. An executor handles all paperwork and does everything necessary to carry out your wishes in your will. Usually your spouse.

Title: Dr Ms Mrs Mr Other _____
First Name: _____ Middle Name: _____ Last Name: _____
DOB: _____
Address: _____ P/C: _____
Email: _____

Title: Dr Ms Mrs Mr Other _____
First Name: _____ Middle Name: _____ Last Name: _____
DOB: _____
Address: _____ P/C: _____
Email: _____

- 3. The name, address and date of birth of the person you want to be the Alternative executor of your will.**

N.B. The Alternative executor steps in if your first chosen executor in Question 2 is unable to act.

Title: Dr Ms Mrs Mr Other _____
First Name: _____ Middle Name: _____ Last Name: _____
DOB: _____
Address: _____ P/C: _____
Email: _____

Title: Dr Ms Mrs Mr Other _____
First Name: _____ Middle Name: _____ Last Name: _____
DOB: _____
Address: _____ P/C: _____
Email: _____

4. The name, address and date of birth of the person/s you want to act as the Guardian of your children if you and your spouse die prematurely?

N.B. The guardian(s) care for the underage children. This is usually uncles and aunties but can be anyone of your choice.

FirstName: _____ Middle Name: _____ Last Name: _____

DOB: _____

Address: _____ P/C: _____

Email: _____

Title: Dr Ms Mrs Mr Other _____

FirstName: _____ Middle Name: _____ Last Name: _____

DOB: _____

Address: _____ P/C: _____

Email: _____

5. Default beneficiaries if each of you and your spouse die prematurely and there are no surviving children or grandchildren?

E.g. 50% to Will-maker's next of kin (and if more than one then equally between them); and 50% to Will-maker's spouse's next of kin (and if more than one then equally between them. If different, list below.

FirstName: _____ Middle Name: _____ Last Name: _____

DOB: _____

Address: _____ P/C: _____

Email: _____

Title: Dr Ms Mrs Mr Other _____

FirstName: _____ Middle Name: _____ Last Name: _____

DOB: _____

Address: _____ P/C: _____

Email: _____

Section C: Testamentary Trust

1. Do you want to set up a testamentary trust in your will?

E.g. If you have children or grandchildren and want to protect them after you pass away.

Client 1: Yes No **Spouse:** Yes No

2. When would you like to set up the Testamentary Trust? (Please circle A or B)

A =Immediately when I die so everything can go straight into the Trust; or

B =To my spouse first, then if she dies, it goes to the trust for the kids.

Client 1: A B **Spouse:** A B

3. The name, address and date of birth of the person you want to be Trustee and Appointor of the testamentary trust.

E.g. The trustee controls the assets of the trust for the benefit of the kids. The appointor has the power to remove the trustee and appoint another one. If you chose A in question 2 then usually the spouse is trustee and appointor of the trust so he/she has full control. If you chose B in question 2 then you should choose someone you trust and someone that can manage your estate for the benefit of the kids.

FirstName: _____ Middle Name: _____ Last Name: _____

DOB: _____

Address: _____ P/C: _____

Email: _____

Title: Dr Ms Mrs Mr Other _____

FirstName: _____ Middle Name: _____ Last Name: _____

DOB: _____

Address: _____ P/C: _____

Email: _____

4. The primary beneficiaries of the testamentary trust.

E.g. These are the people that will benefit from the testamentary trust. If you chose A in question 7 then usually the spouse is included with the kids as beneficiaries. If you chose B in question 7 then it would be just the kids as beneficiaries.

FirstName:	_____	Middle Name:	_____	Last Name:	_____	
DOB:	_____					
Address:	_____				P/C:	_____
Email:	_____			Mobile:	_____	
Title:	<input type="checkbox"/> Dr	<input type="checkbox"/> Ms	<input type="checkbox"/> Mrs	<input type="checkbox"/> Mr	<input type="checkbox"/> Other	_____
FirstName:	_____	Middle Name:	_____	Last Name:	_____	
DOB:	_____					
Address:	_____				P/C:	_____
Email:	_____			Mobile:	_____	

5. Would you like your children to take over as trustee when they reach a particular age?

E.g. We can add a clause that allows your children to be the trustees and appointor of the trust when the youngest reaches say age 30 so they then have full control of the trust and the estate/assets in the trust.

Years of age? _____

Section D: Your Home

How is your home owned?

E.g. If you own a property as joint tenants then the property will automatically pass to the joint owner and will not come under your will. If you own a property as tenants in common then your portion of ownership of the property will fall under your will.

Joint: Tenants in Common:

Section E: Other Trusts

1. Do you have a Family Trust? Yes: No:
2. Do you have a Unit Trust? Yes: No:
3. Do you have a Pty Ltd? Yes: No:

Section F: Superannuation

- 1. Do you have a SMSF? Yes: No:
- 2. Have you made a Binding Nomination? Yes: No:

Section G: Special Circumstances

- 1. Do you have a disabled child? Yes: No:
- 2. Do you have children from a previous relationship? Yes: No:

Specific Bequests

ITEM	Full name and address of beneficiary	Proportion (if applicable)
<i>e.g. all my jewellery</i>	<i>My daughters (details in fact finder)</i>	<i>50/50</i>

THE MCMASTERS LO ANDRAWIS LAWYERS PROCESS TO COMPLETING WILLS

Step 1: Complete attached Will fact finder and return to info@craigsmith.com.au. Please refer to enclosed Wills Info Sheet for more detailed explanations of the relevant roles in a will and some FAQs

Step 2: Craig Smith & Associates will clarify any queries before forwarding to MLA Lawyers to review and prepare draft wills for you to review. Any changes, variations or queries by you are made at this stage and directed back to info@craigsmith.com.au. You and MLA Lawyers can liaise directly with each other in this step if you do not want Craig Smith & Associates to be involved.

Step 3: Final wills are prepared and provided to Craig Smith & Associates to arrange their execution with you. You will be provided with instructions on how to validly execute your Wills. You will then be invoiced by Craig Smith & Associates for the work done.

Fees:

Will	Client 1	Tick below	Spouse	Tick below
Simple will	\$350 plus GST		\$300 plus GST	
Will with Testamentary Trust	\$500 plus GST		\$400 plus GST	
Enduring Power of Attorney	\$100 plus GST		\$100 plus GST	

Authority to Proceed	Signature/s	Date signed
Client 1		
Spouse		

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