



Instructions For Your Will

Please complete and return to NQ Legal

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NQ LEGAL

1. PERSONAL DETAILS

In order to draft your Will we will require the following details. Where more space is required please attach additional pages to the back of this form.

Testator (mandatory)

Full name

Date of birth

Occupation

Marital status

Spouse (if applicable)

Full name

Date of birth

Occupation

Children (if applicable)

Name(s) 1.
2.
3.
4.

Age(s) 1.
2.
3.
4.

Relationship (e.g. full, step) 1.
2.
3.
4.

Testator contact details (mandatory)

Home

Work

Mobile

Facsimile

Postal

Email

Existing Will (if applicable)

Drafting party

Location

Year executed

Advisors (if applicable)

Accountant

Best means of contact

Financial advisor

Best means of contact

Enduring Power of Attorney (mandatory)

Place executed

Date executed

Nominated Attorney(s)

Family history (if applicable)

Name of any previous spouse(s)

Children of previous marriage

Adopted children

Other dependant(s)

- 1.
- 2.
- 3.
- 4.

Relationship of dependant(s)

- 1.
- 2.
- 3.
- 4.

2. EXECUTOR DETAILS

Please note that you may have up to four (4) executors of your estate operating at one time and this is known as administering "jointly." For joint administration an uneven number of executors is preferable as this will allow your executors to make decisions by majority.

Executors of your estate will be required to provide numerous services on your behalf. This obligation can be costly and time consuming. Serious consideration should be given before entrusting these duties to a family member or friend who may not have time to perform them.

As your preferred executor(s) may not always be in a position to administer your estate at the time of your death it is wise to nominate at least one "consecutive" executor who will take the role if one of your preferred executors is unable to act.

First Executor

Full name

Date of birth

Occupation

Residential Address

Capacity
(e.g. jointly, consecutive)

Second Executor

Full name

Date of birth

Occupation

Residential Address

Capacity
(e.g. jointly, consecutive)

Third Executor

Full name

Date of birth

Occupation

Residential Address

Capacity
(e.g. jointly, consecutive)

Fourth Executor

Full name

Date of birth

Occupation

Residential Address

Capacity
(e.g. jointly, consecutive)

3. PROPERTY DETAILS

In order to draft your Will we require detailed information about the current state of your assets and finances, please ensure that all information entered here is correct and where necessary attach additional documentation to the back of this form.

Assets

Please list any assets in which you hold a legal or beneficial interest, such as:

- (a) Real property;
- (b) motor vehicles;
- (c) business assets;
- (d) cash deposits or contents of bank accounts.

Type	Owner(s)	Acquisition date	Current value

Liabilities

Please set out any debts owed by yourself, your spouse, any entity which you control, or any other debt for which you may be liable.

Name of creditor	Name of debtor	Purpose of loan	Loan amount

Companies and Trusts

Please set out details of any family companies and your individual holdings in those companies.

Name of company	Type of shares	Classes of shares	Number of shares	Intended recipients

Life Insurance Policies

Please provide us with details of any life insurance policies held in your name or of which you are the nominated recipient.

Name of company	Policy number	Sum insured	Owner	Nominated beneficiary

Superannuation

Please provide us with details of any superannuation held in your name.

Name of company	Policy number	Insured amount	Account value	Nominated beneficiary

4. DISTRIBUTION

Specific Gifts: Money or Assets

Please provide us with information about the specific gifts you would like to give to specific beneficiaries. Please be aware that there are some risks associated with bequeathing specific sums of money or irreplaceable items. If you require assistance with this section you are encouraged to ask the solicitor at your appointment.

Item / Amount	Name of recipient	Address of recipient

Residuary Beneficiaries

Residuary beneficiaries receive a portion of your estate after any specific gifts bestowed or bequeathed by you have been distributed to the named beneficiaries.

You may distribute the residuary of your estate to a class of beneficiaries (for instance to all of my children equally, and if my child has died to their children equally)

- All my children equally and then
- All my grandchildren equally and then
- All my siblings equally and then
- To the following charity or charitable purpose

Alternatively you can leave the residue of your estate to named beneficiaries. (see table next page)

First residuary beneficiary

Full name

Residential Address

Relationship to
Testator

Age (if under 18)

Percentage of
residuary

Second residuary beneficiary

Full name

Residential Address

Relationship to
Testator

Age (if under 18)

Percentage of
residuary

Third residuary beneficiary

Full name

Residential Address

Relationship to
Testator

Age (if under 18)

Percentage of
residuary

Fourth residuary beneficiary

Full name

Residential Address

Relationship to
Testator

Age (if under 18)

Percentage of
residuary

Thank you for choosing NQ Legal for your will instructions

Please return this form to our office and
speak with one of our friendly solicitors

INNOVATIVE LEGAL SOLUTIONS

Local Government, Property, Planning, & Environmental Law

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