

# Public Trustee

## Will Appointment Checklist



Please use this checklist to think about what you may need to include in your Will and things we may ask you at your appointment.

<b>Children &amp; Family</b>		
Children & Family	<p>Are there any people who you want to leave money or particular items (like jewellery or real estate) to?</p> <p>Do you have a family trust or operate a business as a sole trader or in a partnership?</p> <p>Do you need to provide for someone, like your partner or children?</p> <p>If you have young children, who will be their guardian?</p> <p>At what age should they receive their entitlement? (eg when they turn 18, or when they are older?)</p> <p>Do you need to provide for a disabled child? What will they need should you die?</p>	
Beneficiaries	Please bring with you a list of people you want to be beneficiaries in your Will including their full legal and correctly spelt name, address and date of birth.	
<b>Funerals</b>		
Funeral Arrangements	<p>Instructions with respect to your burial or cremation</p> <p>Details of any prepaid funeral plan/policy and/or funeral bond/prepaid monumental works</p>	
<b>Assets &amp; Liabilities</b>		
Real Estate	<p>Is your house is mortgaged and to whom?</p> <p>The location of the Certificate of Title and what the title reference is</p> <p>Whether you own your property with one or more other people as either Tenants in Common or Joint Tenants</p>	
Vehicles	<p>The model, year, and registration details of any vehicles you own; including motor vehicles, caravans, boats, and/or motor bikes</p> <p>Whether there are any loans against any of your vehicles, and to whom these loans are owed.</p>	
Shares/Investments	All Security Reference Numbers – these can be found on dividend statements	

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	Whether the shares are held jointly or individually and where your capital gains records are held	
Furniture and Effects	The estimated value of these items Any specific items that might need a separate mention in your Will (especially those of a higher value and/or of sentimental value, for example, original paintings and/or service medals)	
Bank Accounts/Term Deposits	Recent bank account statement along with account numbers.	
Superannuation	The name/s of your Fund/s Your Member number/s Whether there are named beneficiaries and/or whether you have a binding nomination	
Insurance	The company names and reference numbers relating to your life or life or funeral policies  Whether you have any beneficiaries nominated in relation to your funeral and/or life policies	
Overseas Assets	Details regarding any international assets you have	
Other Assets	The trust deeds, partnership agreements, and/or articles of association relating to private companies, partnerships, and/or family trusts Details of any digital assets such as online betting accounts	
Liabilities	Details of any outstanding liabilities, such as a home loan or other loans, including loans to family members.	