

WILLS

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CHECKLIST

- Current will
- Birth certificate
- Marriage certificate
- Divorce papers
- Photographic identification (e.g. drivers licence, passport)
- Full names, addresses and dates of birth of family members
- Full names and addresses of proposed executors, beneficiaries and guardians
- Names and addresses of your accountant, financial advisor and stockbroker
- List of assets and liabilities

We also ask that you bring the following documents or information (if applicable) to your initial appointment:

- Financial plan (if any)
- Title deed(s)
- Life insurance policy and annual statement(s)
- Superannuation fund annual statement(s)
- Superannuation death benefit beneficiary nomination form(s) (if applicable)
- Trust deed(s) including self-managed superannuation trust funds
- Company constitution (private) and details of current office bearers and shareholders
- Partnership agreement
- Business succession plan (if any)
- Financial statements for trusts, private companies and partnerships
- Property settlement orders, binding financial agreement, cohabitation agreement or separation agreement
- Child support agreement