



# MackeyWales

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## WILLS INSTRUCTION SHEET

A Will provides for an Executor to manage your estate, appointment of guardians for any minor children and the distribution of your estate to your beneficiaries on death. You can give specific items such as jewellery or certain amounts of money to one or more individuals or charities. You can then provide for the disbursement of the remainder of your estate, after payment of debts and the specific gifts.

This instruction sheet will assist you with the preparation of your Will and help you to identify issues associated with it.

1. **CLIENT 1 FULL NAME:** .....

Occupation: ..... Date of Birth: .....

2. **CLIENT 2 FULL NAME:** .....

Occupation: ..... Date of Birth: .....

3. **ADDRESS:**  
**(Residential)** .....

.....

**(Postal)** .....

**Contacts: (H)** ..... **(W)**

.....

**Fax:** ..... **Mobile:** .....

**Email:** .....

### Built on reputation

**Principals**  
Terry Fanning  
Ross Greatrex

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**4. ASSETS:-**

**Real Property:**

OWNER	ADDRESS

**Super:**

FUND	OWNER	BENEFICIARY

**Business Structures: eg. Companies, Trusts.**

FULL NAME & A.C.N.	CONSTITUTION/DEED HELD BY?

**Life Insurance:**

INSURER	OWNER	BENEFICIARY

*Specific Gifts: eg. money, jewellery*

ITEM	BENEFICIARY

**5. LIABILITIES**

LENDER	SECURITY

**6. ACCOUNTANT DETAILS:**

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

**7. FINANCIAL PLANNER/BUSINESS ADVISER DETAILS:**

.....  
.....

**8. EXECUTORS (Full Name/Relationship to You):-**

(1) .....  
(2) .....  
(3) .....

**9. BENEFICIARIES (Full Name/Relationship to You):-**

(1) .....  
(2) .....  
(3) .....  
(4) .....

**How do you prefer that they make their decisions?:**

Jointly/successively  
(\*circle appropriate decision)

**10. GUARDIANS (IF APPLICABLE) (Full Name):-**

(1) .....

(2) .....

**11. CALAMITY BENEFICIARIES (in the event of you and your children dying in a common calamity):-**

(1) .....

(2) .....

(3) .....

(4) .....

**12. PREVIOUS SPOUSE AND OTHER CHILDREN (if applicable):-**

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**13. WHERE DID YOU HEAR ABOUT MACKEY WALES LAW?**

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**14. ANY OTHER DIRECTIONS:-**

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