



Wills Day Promotion

Client Information (Prepared by Client)

To help in the preparation of your Will please complete the following Instruction Sheet which you should pass to the Solicitor on the day. If you are unable to answer all the questions, the Solicitor will be able to assist you. This information is for the solicitor only and will not be made available to The Salvation Army.

Please Note

This Promotion covers **SIMPLE WILLS ONLY**. This is usually from one spouse to another, or from a parent to children. Husbands and wives must have **separate** Wills. Requests for repeated amendments to the Will prior to signing may incur a fee being charged by the Solicitor. This Promotion does not include the preparation of Wills where a great amount of property, trusts or complex legal business exists, and when this is the case, clients are advised to arrange a special appointment with a Solicitor.

Please print all details clearly.

Your details:

Title Dr Mr Mrs Ms Miss

First Names (in full) _____ Surname _____

Street Address _____

Suburb _____ State _____ Postcode _____

Mailing Address _____

Suburb _____ State _____ Postcode _____

Home () _____ Work () _____ Mobile _____

Email: _____

Occupation: _____ Date of birth: / /

Full Name of spouse/children if applicable

Spouse: Title Dr Mr Mrs Ms Miss

First Names (in full) _____ Surname _____

Children - Names in Full and Dates of Birth



Have you previously made a Will? (please ✓ as appropriate): Yes No

Where is that Will held?

Street Address

Suburb

State

Postcode

Executor – (Person/s administering the Estate after death)

Name (in full)

Street Address

Suburb

State

Postcode

Home ()

Work ()

Mobile

Occupation

Alternate Executor

Name (in full)

Street Address

Suburb

State

Postcode

Home ()

Work ()

Mobile

Occupation

Guardian for infant children

Name (in full)

Street Address

Suburb

State

Postcode

Home ()

Work ()

Mobile

Occupation

Do you want to record funeral details? (please ✓ as appropriate): Yes No

If yes (please ✓ as appropriate): Buried Cremated

Please specify

I would like a (please ✓ as appropriate): Religious Service Other

Please specify

Beneficiaries:



Do you want to include special gifts to organisations/charities? e.g.The Salvation Army):

Yes No

Organisation _____

Gift (percentage or amount) _____

Assets and Liabilities

Please give a brief summary of your assets and liabilities:

Do you hold shares in a private company? Yes No

Do you have a Family Trust? Yes No

Do you run your own business? Yes No

Do you have assets overseas? Yes No

Superannuation

Do you have a Self Managed Superannuation Fund? Yes No

If yes, please provide details

Do you have other superannuation? Yes No

If yes, please provide details

Have you made a death benefit nomination for your superannuation? Yes No

If yes, please provide a copy

Life Insurance

Do you have life insurance? Yes No

If yes, please provide details

