

ESTATE PLANNING QUESTIONNAIRE

Name:	
Address:	
Email Address:	
Contact Number(s):	
Date of Birth:	/ /

Important: When providing names below, please include full details (including middle name).

Will - Executor

Usually, the executor would be your partner. However; in the event of you both being deceased (or you do not have a partner), who would be your executor?

Primary Executor(s)

Name:	
Relationship:	
Address:	
Contact Number(s):	

Name:	
Relationship:	
Address:	
Contact Number(s):	

It is recommended that you nominate a substitute executor - in case the first person you nominate is unable to act at the time. The substitute is only called upon if the primary executor cannot do the job.

Substitute Executor(s)

Name:	
Relationship:	
Address:	
Contact Number(s):	

Children/Dependants

Do you have children? Yes ☐ No ☐

Full Names:	Date of Birth:	More Information (e.g. disability)

At what age should minor children control their inheritance (that is, at what age should the executors hand over the gift to beneficiaries that upon your passing have not yet attained eighteen (18):

- ☐ Eighteen (18)
☐ Twenty-One (21)
☐ Twenty-Five (25)
☐ Thirty (30)
☐ Other:

Guardians

Who do you nominate to be guardian of your dependent children – in the event you both pass away. It is generally suggested that your Guardians are different to the nominated Trustee/s.

Name:	
Relationship:	
Address:	
Contact Number(s):	

Reserve Guardian – if above are unable to perform duties

Name:	
Relationship:	
Address:	
Contact Number(s):	

YOUR FAMILY TREE

Please draw your family tree below.



Asset Questions

Is your primary residence held in **joint tenancy** or **tenants in common**?

Joint ☐ Tenants in Common ☐ Not Sure ☐
N/A ☐

Investment properties: held in joint tenancy or tenants in common?

Joint ☐ Tenants in Common ☐ Not Sure ☐
N/A ☐

Superannuation - have binding nominations been completed? Are they current?

Yes ☐ No ☐ Not sure ☐

Superannuation

Do you have a self-managed superannuation fund?

Yes ☐ No ☐

If "no" go to the next page

Trustees?

Corporate ☐ Individual ☐

Name of Fund:

Please provide a copy of the Trust Deed

Family Trusts

Do you control any Trusts?

Yes ☐ No ☐

If "no" go to the next page

Trustees?

Corporate ☐ Individual ☐

Name of Trust:

Please provide a copy of the Trust Deed

Will details - provide instructions here:

eg. Everything to partner, if both deceased - then equally to child/ren

Any special instructions - i.e. benefits for Charity etc. If nothing, write N/A

Calamity beneficiaries

A calamity beneficiary is a person who will receive your estate if all of your nominated residuary beneficiaries die before you without leaving children.

Who do you nominate to be your calamity beneficiary:

- ☐ Both of your respective sets of parents (50/50), then siblings (couple)
- ☐ Your parents (100%), then siblings (single only)
- ☐ Both of your respective sets of siblings (50/50), then their children (couple only)
- ☐ Your siblings (100%), then their children
- ☐ Other:

Full name:		Percentage:		Relationship:	
Full name:		Percentage:		Relationship:	
Full name:		Percentage:		Relationship:	
Full name:		Percentage:		Relationship:	

Additional comments regarding calamity:

Do you wish to be buried or cremated?

Any particular funeral requests?

Do you wish to be an organ donor?

Yes ☐ No ☐

(Enduring) Power of Attorney

Do you require an enduring power of attorney?

Yes ☐ No ☐

Usually, the Attorney would be your partner. However, in the event of your partner being unable to act, who would be your nominated POA?

Name:	
Relationship:	
Address:	
Contact Number(s):	

Testamentary Discretionary Trust (TDT)

Do you wish to set up a Testamentary Discretionary Trust (**TDT**) to benefit your children?

Yes ☐ No ☐

Will each child be installed as the trustee of their 'own' TDT?

Yes ☐ No ☐

If not, who will be the Trustee of your TDT?

Primary Trustee

Name:	
Relationship:	
Address:	
Contact Number(s):	

Reserve Trustee

Name:	
Relationship:	
Address:	
Contact Number(s):	

In respect of each (TDT) established for each of your children that survives you, on the death of each such child do you wish the default provisions of the trust terms to direct the assets of the trust to their children?

Yes ☐ No ☐

If not, to whom should the default provisions of the trust terms direct the assets to on the death of each child?

Business Owners

Do you own a business/es via partnership I company or Trust?

If "No" go to Signature page

A business asset is generally not "willable" - however, you can pass on your shares in the company or Appointorship via your Will.

Details - Diagram - Please draw a flow chart of your business interests/ownership % 's and indicate your Directorship, Shareholding, Trusteeship, Appointorship where applicable.



Who do you wish to transfer the shareholdings/appointments to:

	Partner first?
	Children next?
	Other (as below)

Name:	
Relationship:	
Address:	

Contact Number(s):

If you are in business with another person, do you have a Business Succession Agreement in place? Yes ☐ No ☐

If “yes”, please provide a copy

Please provide a copy of the following, if applicable:

Trust Deed/s (if you have a Family Trust, or other Trust Structure)

Share certificates – if you have a company structure

Please supply any additional information that you consider is relevant.

This space is for additional diagrams in relation to your businesses (if applicable)

Please go to next page if not applicable

Signature Page

The information provided in this document is true and correct to the best of my knowledge.

Name

Signature

Date /

Checklist

- ☐ Completed questionnaire
- ☐ Fully completed details of Executors/Trustees/Guardians/Children
- ☐ Copy of previous will - if applicable
- ☐ Copy of Trust Deeds - if applicable
- ☐ Copy of SMSF Trust Deed - if applicable
- ☐ Copy of Business Succession Agreement (Buy/Sell) - if applicable
- ☐ Identification - copy of your Driver's Licence (front and back)