# Personal details for will instruction

| Will status | | | | | | | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| New Will | | | | Change to Will previously prepared by Public Trustee | | | | | | | Change to Will not previously prepared by Public Trustee | | | |
| Appointment date | |  | | | | | | | | | | | | |
| Client details | | | | | | | | | | | | | | |
| First and middle names | | |  | | | | | | | | | | | |
| Surname | | |  | | | | | | | | | | | |
| Occupation | | |  | | | | | | | | | | | |
| Date of birth | | |  | | | | | | | | | | | |
| Place of birth | | |  | | | | | | | | | | | |
| Relationship status | | |  | | | | | | | | | | | |
| Indigenous | | | Yes | | | No | | | | | | | | |
| Residential address | | |  | | | | | | | | | | | |
| Suburb | | |  | | | | | | | | | | | |
| Postcode | | |  | | | | | | | | | | | |
| Postal address | | |  | | | | | | | | | | | |
| Suburb | | |  | | | | | | | | | | | |
| Postcode | | |  | | | | | | | | | | | |
| Home telephone | | |  | | | | | | | | | | | |
| Work telephone | | |  | | | | | | | | | | | |
| Mobile telephone | | |  | | | | | | | | | | | |
| Email | | |  | | | | | | | | | | | |
| Next of kin | | | | | | | | | | | | | | |
| Name | | |  | | | | | | | | | | | |
| Postal address | | |  | | | | | | | | | | | |
| Suburb |  | | | | | | | | | | | | | |
| Post code |  | | | | | | | | | | | | | |
| Relationship |  | | | | | | | | | | | | | |
| Date of birth |  | | | | | | | | | | | | | |
| Home telephone |  | | | | | | | | | | | | | |
| Work telephone |  | | | | | | | | | | | | | |
| Mobile telephone |  | | | | | | | | | | | | | |
| Email |  | | | | | | | | | | | | | |
| Children of current relationship | | | | | | | | | | | | | | |
| **Full name of living children** | | | | **Address** | | | | | | | **Date of birth** | | | |
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| Children of any previous relationship/s | | | | | | | | | | | | | | |
| **Full name of living children** | | | | **Address** | | | | | | | **Date of birth** | | | |
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| Deceased children | | | | | | | | | | | | | | |
| **Full Name of Deceased Children** | | | | **Date of Death** | | | | | | | **Names of Children of deceased Children** | | | |
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|  | | | |  | | | | | | |  | | | |
| Name of beneficiaries if different from above | | | | | | | | | | | | | | |
| **Full Name of Other Beneficiaries** | | | | **Address** | | | | | | | **Relationship** | | | |
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| Real estate | | | | | | | | | | | | | | |
| **Principal Residence Address** | | | |  | | | | | | | | | | |
| Owned | | | | Yes | | | | No | | | | | | |
| Rented | | | | Yes | | | | No | | | | | | |
| Mortgage | | | | Yes | | | | No | | | | | | |
| Ownership | | | | Sole | | | | Join | | | | TIC | | |
| **Investment Property Address** | | | |  | | | | | | | | | | |
| Owned | | | | Yes | | | | No | | | | | | |
| Rented | | | | Yes | | | | No | | | | | | |
| Mortgage | | | | Yes | | | | No | | | | | | |
| Ownership | | | | Sole | | | | Join | | | | TIC | | |
| **Investment Property Address** | | | |  | | | | | | | | | | |
| Owned | | | | Yes | | | | No | | | | | | |
| Rented | | | | Yes | | | | No | | | | | | |
| Mortgage | | | | Yes | | | | No | | | | | | |
| Ownership | | | | Sole | | | | Join | | | | TIC | | |
| Household furniture & effects | | | | | | | | | | | | | | |
| Household furniture and effects in Principal Residence are owned as | | | | Sole | | | | | | | Joint | | | |
| Household furniture and effects in Investment Property are owned as | | | | Sole | | | | | | | Joint | | | |
| Vehicles / bikes / caravan / boat / farm equipment / etc | | | | | | | | | | | | | | |
| Make / Type / Year | | | |  | | | | | | | | | | |
| Ownership | | | | Sole | | | | | | | Joint | | | |
| Make / Type / Year | | | |  | | | | | | | | | | |
| Ownership | | | | Sole | | | | | | | Joint | | | |
| Make / Type / Year | | | |  | | | | | | | | | | |
| Ownership | | | | Sole | | | | | | | Joint | | | |
| Antiques / jewellery / collections / etc | | | | | | | | | | | | | | |
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| Bank accounts / credit unions | | | | | | | | | | | | | | |
| **Bank / Other Financial Institution** | | | |  | | | | | | | | | | |
| Branch | | | |  | | | | | | | | | | |
| Ownership | | | | Sole | | | | | Joint | | | | | |
| **Bank / Other Financial Institution** | | | |  | | | | | | | | | | |
| Branch | | | |  | | | | | | | | | | |
| Ownership | | | | Sole | | | | | Joint | | | | | |
| **Bank / Other Financial Institution** | | | |  | | | | | | | | | | |
| Branch | | | |  | | | | | | | | | | |
| Ownership | | | | Sole | | | | | Joint | | | | | |
| **Bank / Other Financial Institution** | | | |  | | | | | | | | | | |
| Branch | | | |  | | | | | | | | | | |
| Ownership | | | | Sole | | | | | Joint | | | | | |
| Investments | | | | | | | | | | | | | | |
| **Shares / Debentures / Unit Trusts / Bonds** | | | |  | | | | | | | | | | |
| Ownership | | | | Sole | | | | | | | Joint | | | |
| **Shares / Debentures / Unit Trusts / Bonds** | | | |  | | | | | | | | | | |
| Ownership | | | | Sole | | | | | | | Joint | | | |
| **Shares / Debentures / Unit Trusts / Bonds** | | | |  | | | | | | | | | | |
| Ownership | | | | Sole | | | | | | | Joint | | | |
| Financial / tax information | | | | | | | | | | | | | | |
| Name of Financial Advisor: | | | | |  | | | | | | | | | |
| Name of Tax Agent: | | | | |  | | | | | | | | | |
| Location of Important Documents: | | | | |  | | | | | | | | | |
| Superannuation | | | | | | | | | | | | | | |
| Superannuation / Company or Fund | | | |  | | | | | | Nominated Beneficiary | | |  | |
| Superannuation / Company or Fund | | | |  | | | | | | Nominated Beneficiary | | |  | |
| Superannuation / Company or Fund | | | |  | | | | | | Nominated Beneficiary | | |  | |
| Life assurance | | | | | | | | | | | | | | |
| Company | | | |  | | | | | | On life of | | | |  |
| Company | | | |  | | | | | | On life of | | | |  |
| Loans to family / friends | | | | | | | | | | | | | | |
| Recipient |  | | | | | | | | | | | | | |
| Amount | $ | | | | | | Terms / Written Evidence (Y/N) | | | | | | |  |
| Recipient |  | | | | | | | | | | | | | |
| Amount | $ | | | | | | Terms / Written Evidence (Y/N) | | | | | | |  |
| Recipient |  | | | | | | | | | | | | | |
| Amount | $ | | | | | | Terms / Written Evidence (Y/N) | | | | | | |  |
| Prepaid funeral | | | | | | | | | | | | | | |
| Funeral Company / Fund) | | | |  | | | | | | | | | | |
| Details | | | |  | | | | | | | | | | |
| Partnerships / businesses / trusts / private companies / other assets | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | |
| Other personal debts (HECS, personal loans, hire purchase, child support) | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | |

## Important privacy statement

The Public Trustee’s Office is authorised by the Public Trustee Act to prepare wills and collects the information on this form for the purpose of drafting wills. Some of the information obtained may be provided to members of the public and other interested persons for the purpose of maintaining the Wills Register established under section 49 of the Wills Act. This information does not include the contents of the will, but may include those details required by section 50 of the Act, namely the name of the testator or testatrix, and in some circumstances the date of the will, address of the testator and name and address of the executor or executrix – generally only sufficient detail to establish the existence of a will.

Should the information on this form not be provided, the Public Trustee is unable to prepare the will. Authorised persons can access personal information provided on the form upon request. Please contact the Deputy Public Trustee on 08 89996164 or write to GPO Box 470 Darwin NT 0801.