

Details for a Simple Will

Full name, occupation, city/town of residence:

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Are you domiciled in New Zealand or elsewhere (state).

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(If you are domiciled elsewhere, then a separate Will complying with that country's laws may be needed. However, if you do not intend to live indefinitely in another country (i.e. you call New Zealand home, and intend to return), it is still possible to be domiciled in New Zealand.)

Executors / Trustees full names, occupations, and place of residence (I recommend at least two people, and no more than three):

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Childrens' full names and dates of birth:

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Are the children living with you?.....

Testamentary guardians for children (*the people who will make important decisions about your children's upbringing, while they are under 17*):

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Body – to be cremated or buried (and where, if preferred)?

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Any specific directions for funeral, wishes to be an organ donor or have their body used for medical research?

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Specific legacies / bequests / gifts:

(*eg: \$10,000.00 to SPCA, Painting of Mount Cook to SC Museum, \$5,000.00 to nephew Gobo etc*)

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Residuary Beneficiaries *(the people who get what is left after the bills are paid, and the specific gifts distributed)*

Full names of beneficiaries, occupations, ages and share/proportion to each:

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What is to happen if a residuary beneficiary dies before you – do you want the deceased beneficiary’s share to go equally among the remaining beneficiaries, or do the deceased’s children (i.e. your grandchildren) get their parent’s share?

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Family Trust details:

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Assets and Liabilities: (include any funeral fund, shares, who you bank with, and life insurance details?)

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Any prior relationships or relationship property agreements?

Other notes/queries: