



# Will Preparation Checklist

1. What is your full name, occupation and address?

2. Who do you want to be your executor/s – we will need your executors full name, address and occupation?

*ADVICE NOTE - your executors are the people who carry out your wishes when you die. They will work closely with your solicitor to administer your Estate. Often people will appoint two people to act together, or one person (such as their spouse or partner) and then a back up person if their spouse or partner is unwilling or unable to act in that role.*

3. Are you married, engaged, separated or in a long term relationship? If so, what is the full name, address and occupation of your current spouse or partner.

*ADVICE NOTE - Your current and previous marital status can impact on the types of things that need to be considered in your Will. Your Will is invalid if you marry after you have made it. Divorce can also impact some of the clauses in your Will. So, its important to contact us if your marital status changes once your Will has been made.*

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4. Do you have any children, if so, what are ALL of their full names and dates of birth?

5. Are the children with your current partner?    Yes                      No

6. Are your children under the age of 18 years, if so who would you like to appoint as the guardian of your children? You can only appoint one person to act at a time.

*ADVICE NOTE – the guardian of your children is not necessarily the person that they live with, rather this is the person that you want to have the legal right to make the major decisions for your children until they turn 18 – where will they live, what school will they go to, if they need medical treatment, what type of treatment is required.*

7. Do you want to be buried or cremated? Is there any particular place that you want to be buried or your ashes to be scattered?

8. Do you wish to donate any body parts for medical research, organ donation or science?

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## ASSETS

9. Do you have any specific personal items that you would like to go to specific people – examples often include family heirlooms, jewellery or firearms. If so, what are those items (eg “my mother’s ruby engagement ring”) and what is the name, address and relationship to you of the person you would like that item to go to?

10. What assets do you own? If you own a property, what is the address of that property?

11. What would you like to happen to your assets (property, bank accounts, Kiwisaver etc) when you die?

*ADVICE NOTE – Some people leave everything to their wife/husband/spouse in the first instance and then when they both die, leave everything to their children equally. This is called a simple Will. However, if you are a blended family, the best option for you may be different as a simple Will can create risks of a claim against your estate. Therefore, if you are a blended family, it is best to discuss what you would like to happen with your assets with your lawyer.*

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