

Date:

PENNEY BLAIKIE LAW

INSTRUCTION SHEET FOR YOUR WILL

Your Full Legal Name:	
Occupation:	
Address:	

Have you completed the PBL Assets and Liabilities form? Yes No

Do you hold a current will? Yes No Held where? _____

1. Funeral directions and other related wishes

Do you wish to be buried or cremated? Buried Cremated Leave this out

Do you have any special funeral directions?

2. Executors of your will

*Full name, address and occupation of person or persons you wish to name as executor(s) (ie, **the person(s) who would administer and distribute your estate when you die**). This can be a person you wish to benefit under your will, or some other independent person such as your solicitor, or a combination of these.*

Executor #1

Full Legal Name:	
Occupation:	
Town of residence:	
Relationship to you:	

If your spouse or partner, do you direct all your property to go to this person. Yes / No

Executor #2

Full Legal Name:	
Occupation:	

Town of residence:	
Relationship to you:	

Executor #3

Full Legal Name:	
Occupation:	
Town of residence:	
Relationship to you:	

Substitute Executor/s: (If Executor dies before you)

Full Legal Name:	
Occupation:	
Town of residence:	
Relationship to you:	

3. Appointment of testamentary guardian(s)

Do you wish to appointment testamentary guardian(s) for your children under the age of 18 years?

Full Legal Name:	
Occupation:	
Town of residence:	
Relationship to you:	

Full Legal Name:	
Occupation:	
Town of residence:	
Relationship to you:	

4. Specific gifts or legacies

Do you wish to make any specific gifts (legacies) of money, heirlooms, taonga or chattels?

Full Legal Name:	
Occupation:	
Town of residence:	
Relationship to you:	
Gift:	

Full Legal Name:	
Occupation:	
Town of residence:	
Relationship to you:	
Gift:	

Full Legal Name:	
Occupation:	
Town of residence:	
Relationship to you:	
Gift:	

Full Legal Name:	
Occupation:	
Town of residence:	
Relationship to you:	
Gift:	

5. **Do you wish to create a life interest or a trust?** Yes No

Full Legal Name:	
Occupation:	
Town of residence:	
Relationship to you:	
Life Interest:	
Trust Name:	

Full Legal Name:	
Occupation:	
Town of residence:	
Relationship to you:	
Life Interest:	
Trust Name:	

6. **Remainder Estate**

Who is to receive the residue of your estate? (*E.g. To my partner or children in equal shares*).

If you are in a long-term relationship then generally joint property (*e.g real estate, bank accounts cars and chattels*) will go to your partner by way of survivorship.

All to my spouse or partner: Yes No

All to my children in equal shares: Yes No

Otherwise please name below:

Name:	
Occupation:	
Town of residence:	
Relationship to you:	
Share:	

Name:	
Occupation:	
Town of residence:	
Relationship to you:	
Share:	

Name:	
Occupation:	
Town of residence:	
Relationship to you:	
Share:	

Name:	
Occupation:	
Town of residence:	
Relationship to you:	
Share:	

7. If any beneficiary dies before you, what would like to happen to his or her share? (E.g to my children or to my grandchildren once they reach the age of 24):

8. Do you have any power of appointment under any trust or estate or power to appoint directors, which can be exercised under your will? *In other words, are you a current trustee of a family trust which can be transferred on your death?*

9. Have you **made any promise**, whether enforceable or not, to leave property by will?
(*Testamentary Promises*)

10. If you are omitting any of your family from provision, please indicate the reasons, as family omitted may apply to the Court for provision from the estate:

11. Are there any other special provisions you wish to make?

12. Passwords for online or codes:

- Social Media
- Computers & Smart phones
- Alarms

Write a list of instructions in a sealed envelope and we can store these with your will.

ACKNOWLEDGEMENT

Should I die before completing and signing a formal will before two witnesses I declare this document to be my last will and request the person or persons I have chosen to be my executor(s) to apply for probate of this Will Instruction Sheet as an informal will.

Full name:

Signature:

Date: