



Your Will Information Checklist

This information checklist may assist you when preparing for an appointment with your solicitor to discuss making your Will.

Personal Details

1. Full Name _____
2. Address _____
Suburb _____ State _____ Postcode _____
3. Telephone (Home) _____ (Mobile) _____
4. Email _____
5. Occupation (if applicable) _____
6. Date of Birth _____
7. Marital Status Single De-facto Married Separated Divorced
8. Name of Partner _____
9. Do you already have a Will? Yes (Please take a copy to the appointment) No
10. If yes, where is it kept? _____
11. Immediate family (list children including any with whom you have no contact)
Name _____
Address _____
Relationship _____
Name _____
Address _____
Relationship _____



Name _____

Address _____

Relationship _____

Name _____

Address _____

Relationship _____

Please list other immediate family members at the end of this document if more space is required

Assets

Generally, when assets are owned in joint names ownership passes automatically to the survivor/s upon the death of the other joint owner. As a result, joint property does not form part of a person's estate. It cannot be disposed of by a Will or under the intestacy laws. Commission is not charged on joint property. It will be helpful to your lawyer to understand the size of your Estate in protecting your wishes so please complete the details below:

House/ Real Estate

Address	Owned solely or jointly	Estimated \$ value
_____	_____	_____
_____	_____	_____
_____	_____	_____

Bank Accounts

Bank / Branch	Owned solely or jointly	Estimated \$ value
_____	_____	_____
_____	_____	_____
_____	_____	_____

Car (make/ model/ year)	Registered in whose name	Estimated \$ value
_____	_____	_____



Shares / Debentures

Registered in whose name

Estimated \$ value

_____	_____	_____
_____	_____	_____
_____	_____	_____

Insurance Policies

Company _____ Policy number _____

Beneficiary nominated _____

Superannuation (if self managed, please provide a copy of the trust deed)

Company _____ Policy number _____

Beneficiary nominated _____

Are there any other assets or liabilities that will need to be considered in your Estate?

Overseas Assets Yes (please provide details) No

Loans to Family/ Others (to be brought into account for distribution purpose)

Yes (please provide details) No

Name _____ Amount \$ _____

Name _____ Amount \$ _____

Liabilities (estimated total) Amount \$ _____

Have you signed any personal guarantees? Yes (please provide details) No

Your Accountant /Financial Planner

Company _____ Name _____

Address _____ Suburb _____ State _____ Postcode _____

Appointment of Executors/ Trustees and Guardians

Do you want your spouse to be the executor and trustee of your estate? Yes No

If not your spouse, please nominate who:

Full Name _____

Address _____

Suburb _____ State _____ Postcode _____

Telephone (Home) _____ (Mobile) _____

Relationship to you _____

If your nominated Executor is unable to act when required, please nominate a second Executor.

Full Name _____

Address _____

Suburb _____ State _____ Postcode _____

Telephone (Home) _____ (Mobile) _____

Relationship to you _____

Specific Gifts

1. Do you wish to make specific gifts or property or money? Yes No

2. Is the gift to be made even if your spouse is still alive? Yes No

3. Is the item of property subject to a mortgage or charge? Yes No

Please give the full name, address and details of the gift, for each beneficiary

Full Name _____

Address _____

Suburb _____ State _____ Postcode _____



Telephone (Home) _____ (Mobile) _____

Relationship to you _____

SPECIFIC GIFT _____

Full Name _____

Address _____

Suburb _____ State _____ Postcode _____

Telephone (Home) _____ (Mobile) _____

Relationship to you _____

SPECIFIC GIFT _____

Full Name _____

Address _____

Suburb _____ State _____ Postcode _____

Telephone (Home) _____ (Mobile) _____

Relationship to you _____

SPECIFIC GIFT _____

CHARITABLE GIFT

Telethon would be honoured to receive a gift through your Will. Any gift large or small, after providing for your family, will have a positive impact on the future of Western Australian children.

To include Telethon in your Will, you could include the following

“I bequeath to The Channel 7 Telethon Trust (ABN: 56 069 482 829), 50 Hasler Road, Osborne Park WA 6017:

(the residue of my estate) or;



(a specific sum) and/or;

(specified items) or;

(a specified percentage of my estate)

free of all duties, and a receipt from an authorised officer of the organisation shall be a complete and sufficient discharge for the executor(s)".

Your name: _____

Date: ____/____/____

Useful contacts:

Channel 7 Telethon Trust
50 Hasler Road, Osborne Park WA 6017
Phone: (08) 9344 0754

