GhS **LEGAL**

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ESTATE PLANNING INSTRUCTION SHEET

CLIENT DETAILS

Surname(s)

Given Names

Residential

Address

Postal Address

(if different)

Contact Nos

(Business)

(Home)

(Mobile)

Email

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RELEVANT INFORMATION REQUIRED FROM CLIENT

Personal Circumstances

Status of domestic relationship

Married / Partnered / Marriage Contemplated/ Single / Widowed/ Separated/ Divorced

Name of spouse or partner (if estate planning is being done separately):

Names, Ages & Addresses of Children/Intended Beneficiaries (if any)

Details of stepchildren (if any):

Details of any other financial dependants (if any):

Details of existing or anticipated executorships (IE IN OTHER WILLS)

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Details of Any Existing

Will(s),

power(s) of attorney

binding or non-binding relationship agreements

Superannuation binding nominations

Deeds for self managed super funds & family trusts (and copies of family trust elections)

Most recent statements of financial position for family trusts/ companies, including loan accounts

Details of any personal guarantees

Partnership/shareholder/other intra business agreements

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OWNERSHIP OF INVESTMENT ASSETS

"**Non-Super" Assets**

eg family home, shares portfolio, business

Owner, eg joint, family trust

Value

Debt

CGT

Name(s) of **Superannuation Fund(s)**

If a SMSF, show all member balances

Current

Balance

Binding nominations or binding directions ?

Life Insurance – Insurer Type of cover, eg

death, TPD, trauma

Nominated Beneficiary

eg super fund, self owned

Level of Cover $

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Transfers of assets that need (or may need) to be anticipated/taken into account (if any) eg lifetime gifts; loans to family members

Ownership of Business Assets

details shareholder and funded "buy-sell" agreements

Business Owner eg family trust

Estimated Value of Business

Any family members work in the business ?

Business Debt

Security for Business Debt

....

Date