

## Wills and Powers of Attorney

### **The importance of a will**

A will is an essential tool in ensuring your affairs are properly ordered and benefit those you choose when you die.

Everyone's situation is different and your will needs personal attention in order to reflect your circumstances.

If you have a current will it may need to be reviewed, particularly if made more than five years ago, or if your circumstances have altered.

Completing the particulars in our will check list in this brochure will assist us in advising you and preparing your will.

### **The importance of a power of attorney**

Equally as important as a will is to have a power of attorney in case you are unable to manage your own affairs through ill health.

A power of attorney means that you delegate to a person you trust the legal authority to act on your behalf. That person is known as your attorney.

The attorney can, when it becomes necessary to do so, manage your affairs.

Without a power of attorney and should you become ill or incapable of managing your affairs then the management and control of your affairs

might pass to State Trustees or to some other person appointed. In either case not someone of your choosing.

## Nevetts Lawyers will check list

### 1. Personal details

- Surname \_\_\_\_\_
- Given names \_\_\_\_\_
- Maiden name (where applicable) \_\_\_\_\_
- Other names in which your assets may be held (eg. Trusts? Companies?) \_\_\_\_\_
- Current address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
- Date of birth \_\_\_\_\_
- Place of birth \_\_\_\_\_
- Doctor \_\_\_\_\_
- Stockbroker/financial advisor \_\_\_\_\_
- Accountant \_\_\_\_\_
- Banker \_\_\_\_\_

### 2. Marriage and children

- Are you married or in a domestic relationship? Yes/No  
If yes:
  - Date & place \_\_\_\_\_
  - Full name of spouse/partner \_\_\_\_\_
  - Names of children and date(s) of birth \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- Names of any children which have died before you and date(s) of death

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**3. Family details**

- Given names
- Surname
- Maiden name
- Date of birth
- Place of death
- Date of death

Father

Mother

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- Given names
- Surname
- Maiden name
- Place of birth
- Place of death
- Date of death

Brothers

Sisters

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**4. Notification of death**

On my death please notify immediately the following:

Name	Address	Phone
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**5. Funeral arrangements**

I desire:

- Burial/cremation
- Buried/cremated at
- Funeral director
- Service to be conducted by
- According to the rites of the denomination
- Any other special arrangements regarding my funeral

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**6. Directions regarding use of human tissue**

Any such directions should be contained in your will and your next of kin, doctor and any donee institution notified so that your wishes can be complied with. In some cases, special arrangements are necessary including carrying appropriate forms or cards eg. donor card for eye donation or donation of heart or kidney.

**7. Hospital benefits or friendly society**

Name	Address	Membership number
_____	_____	_____
_____	_____	_____
_____	_____	_____

**8. Assets**

**Home**

- Owned singularly/jointly with \_\_\_\_\_
- Title, deed and insurance policies held where \_\_\_\_\_
- Mortgage? \_\_\_\_\_
- If mortgage, with whom? \_\_\_\_\_

**Bank, building society or credit union accounts**

Name bank/ building society	Account number	Account name	Current balance
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Superannuation fund**

- Name of fund \_\_\_\_\_
- Address of trustee \_\_\_\_\_
- I have nominated the following

beneficiaries to receive my  
superannuation entitlement:

Name	Address	Relationship
_____	_____	_____

**Life insurance**

Policy number	Company	Type of policy
_____	_____	_____

**Shares in companies**

Name of company	Number of shares	Type of shares
_____	_____	_____

**Debentures**

Name of company	Number of debentures	Type of debentures
_____	_____	_____

**Bonds**

Name of company	Number of bonds	Type of bonds
_____	_____	_____

**Motor vehicle**

Type of vehicle	Registration number	Insurance details
_____	_____	_____

**Other assets**

(Here, consider whether you might have any of the following):

- Interest in a deceased person's estate
- Interest in a partnership or trust
- Livestock or crops
- Farming plant or equipment
- Furniture
- Jewellery
- Valuable books or pictures
- Cash

Type of asset	Details of whereabouts	Likely value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**Safe deposit**

Here list any safe deposit packets that you might have with your bank

Bank	Location of bank	Details
_____	_____	_____
_____	_____	_____

**Centrelink**

If you are in receipt of Centrelink:

- Centrelink number \_\_\_\_\_
- Pension payable \_\_\_\_\_

- Veterans affairs service  
number

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## 9. Funds

At the time of your death your estate will need funds which you can provide from your disposable assets or from insurance or cash.

Examples where funds will be required include:

- medical and funeral expense
- family expenses
- repayment of loans, mortgages and other debts

If in any doubt of the capacity as to your estate to meet any such expense, you ought to discuss it with us.

## 10. Excluding beneficiaries

At times people may decide to exclude family members from their will for good reason.

If you have done so in your will or intend to do so you may wish to list your reasons for so doing.

## 11. Specific wishes

At times you may have particular concerns or wishes which you would like to express and these will often not be listed in your will.

Please list any particular wishes.

## 12. Powers of attorney

During your lifetime, you have an opportunity of appointing a person to be your attorney should you for any reason be unable to look after your own affairs.



If you do not have a power of attorney and become incapacitated, there is a risk your affairs will come under the control of another person or body.

- Do you have a power of attorney?
- If yes, who is/are your attorney(s)?
- Address of attorney(s)

**Nevetts Lawyers are a member of Law Australasia, the National Association of Law Firms**

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