



WILLS INSTRUCTIONS FORM

All details to be completed and this form is to be e-mailed to len.tactics@gmail.com If a copy current Will is available attach as PDF

Date:

FULL NAME

ADDRESS

OCCUPATION

DATE OF BIRTH

NAMES & ADDRESSES
OF EXECUTORS
& TRUSTEES
*(The person/s you want to look
after your estate)*

FIRST

IF THEY CANNOT ACT THEN:

BURIAL OR CREMATION
DIRECTIONS

FULL NAMES OF
GUARDIANS OF MINORS
*(The person/s who will be
guardians of your minor
children)*

DETAILS OF SPECIFIC
GIFTS
(use separate sheet if reqd)
Detail any specific gifts you
want to make.
Include the relationship of
the person to you. Eg.
Niece, nephew etc



GIFT OF DEBT TO TRUST

(provide full name of trusts to whom debt is being forgiven)

This only applies if you have a family trust

DOES CLIENT WISH TO EXERCISE POWER OF APPOINTMENT UNDER PROVISIONS OF TRUST DEED?

This only applies if you have a family trust

Trust name

Person/s name/s

Trust name

Person/s name/s

DOES CLIENT WISH TO EXERCISE POWER OF APPOINTMENT UNDER PROVISIONS OF THE INHERITANCE TRUST DEED?

This only applies if you have a Inheritance Trusts for your children

INHERITANCE TRUSTS:

Trust Name 1 _____ n/a _____

Child's Name _____

Become Trustee: Yes/No Along with other trust co. : Yes/No

Trust Name

2 _____ n/a _____

Child's Name _____

Become Trustee: Yes/No Along with other trust co. : Yes/No

INHERITANCE TRUSTS:

Trust Name 1 _____ n/a _____

Child's Name _____

Become Trustee: Yes/No Along with other trust co. : Yes/No

Trust Name

2 _____ n/a _____

Child's Name _____

Become Trustee: Yes/No Along with other trust co. : Yes/No

RESIDUE TO:

e.g. to wife/husband or equally to children -NAMES REQUIRED

RESIDUE IS EVERYTHING YOU HAVE NOT MENTIONED UNDER GIFTS

FULL NAMES OF BENEFICIARIES AND RELATIONSHIP TO YOU

DETAILS OF HOW THEY ARE TO BENEFIT

ANY ADDITIONAL NOTES CONTINUE ON SEPARATE SHEET.
IF YOU NEED ANY ASSISTANCE FILLING OUT THIS FORM PLEASE PHONE LEN MCKEOWN 021973684

I confirm the details supplied are correct and agree to pay your fees for preparation of a will based on these instructions

Signed

Date.....