

**INFORMATION NEEDED TO PREPARE A WILL**  
m<sup>c</sup>veaghfleming

Your Full Name: \_\_\_\_\_

Your Occupation: \_\_\_\_\_

Your Residential Address: \_\_\_\_\_  
\_\_\_\_\_

If you are married/in a long term relationship, the full name of your husband/wife/partner:  
\_\_\_\_\_

For Wills in which husband/wife/partner leave all to each other, the husband/wife/partner surviving may be named as trustee and sole beneficiary.

Following the death of that surviving spouse, alternative trustees will need to be appointed. Who would you like these people to be? Two are recommended we suggest a family member (who can be a beneficiary) and a professional (for independence and administration guidance, ie a lawyer) and both should be a resident of New Zealand.

For Wills where there is no spouse/partner, the Estate is left in the first place to the trustees and then to the beneficiaries of your choosing.

Full names, occupations and places of residence of chosen trustees\*: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**M c V E A G H F L E M I N G**

If you have children who would you wish to be their guardians\*: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

\* Please ensure you provide the full name, occupation and place of residence (ie city/town) of all trustees, beneficiaries or guardians named in your Will.

Is there any personal property, such as items of jewellery, vehicles, special pieces of art or china that you would like to leave to a particular person? If you have a long list it is a good idea to make a list separate from your Will and have that list referred to in your Will.

Name of item and the recipient\*: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

You may wish to make a gift of money to someone.

Name of recipient and amount\*: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What would you like to do with the balance of your Estate? Who are the beneficiaries going to be? Your children, your grandchildren, an organisation?

Name of Beneficiaries\*: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\* Please ensure you provide the full name, occupation and place of residence (ie city/town) of all trustees, beneficiaries or guardians named in your Will.

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Provision, called a gift over, can be made in the event of, for example, one of your children failing to survive you, the part of your Estate which that child would have inherited can then go to their child/children. A gift does not include the spouse of any of your children. If any beneficiary of your Will is under 20, there is a provision for advances to be made for education, maintenance and welfare.

How is your home property owned? Do you own it as joint tenants with your spouse/partner or another person, (upon your death, your share automatically passes to your joint owner) or as tenants in common (in which case your share will pass in the manner you provide for in your Will).

Is your property in your name alone/joint tenants/tenants in common? \_\_\_\_\_  
\_\_\_\_\_

What special arrangements would you like to make with regard to:

- Organ Donation (please only list if not on Drivers Licence): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Funeral arrangements (cremation/burial): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The above are expressed as 'desires'. Here may be circumstances, for example, death occurring while overseas, where it may be inappropriate for a body to be transported back to New Zealand for burial.

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