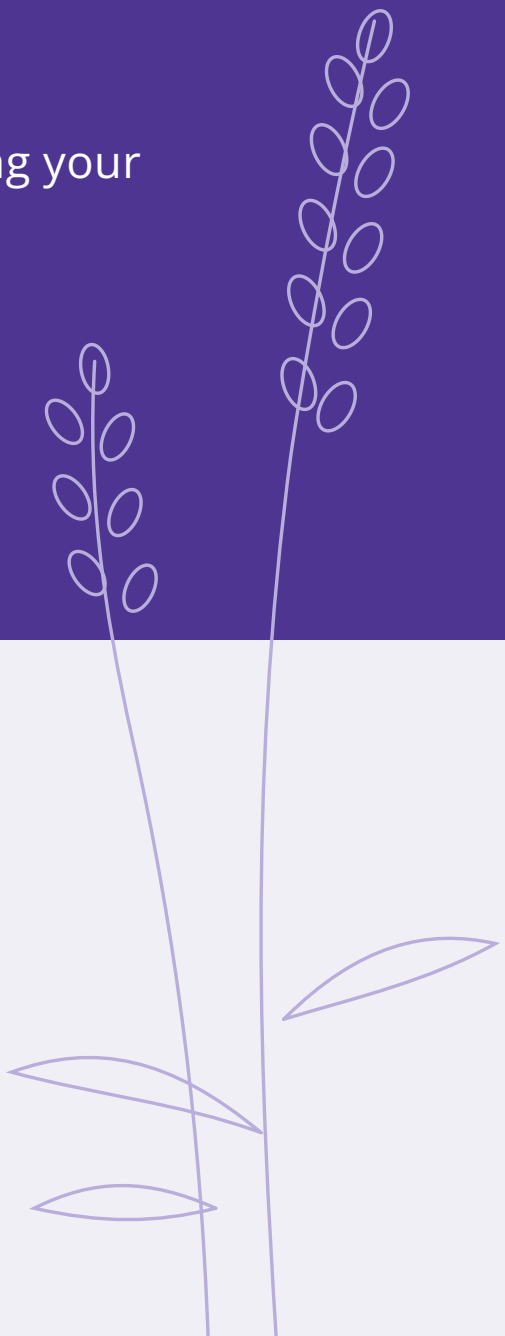
ALA LAW

YOUR FAMILY & ESTATES LAWYERS

# What to bring to your wills appointment

A client checklist for making or updating your will in NSW



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Making a will is one of the most important things you can do for the people you care about. Gathering the information below before your appointment helps us prepare your will efficiently and makes sure nothing is missed. **Don't worry if you can't find everything** – bring what you have and we'll guide you through the rest.

| Section 1: About you and your family | |
|---|---|
| **About you** | |
| ☐ | Photo identification (driver's licence or passport) |
| ☐ | Your full legal name, any other names you are known by, your date of birth, address and contact details |
| ☐ | Your current will and any codicils, if you have one (the original or a copy) |
| ☐ | Your relationship status, and details of any current or past marriages or de facto relationships |
| ☐ | Any divorce orders, property settlement orders or financial agreements from a previous relationship |
| **Your family and the people who matter to you** | |
| ☐ | Full names and dates of birth of your spouse or partner and your children, including stepchildren and children from previous relationships |
| ☐ | Details of anyone who depends on you financially, or who has a disability or may need ongoing care |
| ☐ | Anyone you are choosing not to provide for, and your reasons<br>This helps us advise you about the risk of a family provision claim. |
| **Who you want to appoint** | |
| ☐ | Your executor – the person (or people) you trust to carry out your wishes – and a backup |
| ☐ | A guardian for any children under 18, and a backup |
| ☐ | If you would like to set up a trust in your will (for example, for young children), who you would like to manage it |

| Section 2: What you own and what you owe | |
|---|---|
| **Property and money** | |
| ☐ | Real estate: the address of each property, and whether it is owned in your name alone, as joint tenants or as tenants in common<br>A recent rates notice or title search is helpful. |
| ☐ | Bank accounts, term deposits, shares and other investments |
| ☐ | Superannuation: fund names, approximate balances and a copy of any death benefit nomination |
| ☐ | Life insurance policies, including any cover held through your super |
| **Business, trusts and other assets** | |
| ☐ | Business interests, family trusts or companies – trust deeds, company details and who controls them |
| ☐ | Vehicles, jewellery, collections and items of sentimental value you would like to gift |
| ☐ | Any assets held overseas |
| ☐ | Digital assets and online accounts (for example photos, cryptocurrency and social media) |
| **Debts** | |
| ☐ | Mortgages, personal or business loans and credit cards |
| ☐ | Any guarantees you have given for someone else's debts |

## Good to know

- **Superannuation** does not automatically form part of your estate. Who receives it depends on your fund's rules and any binding nomination, so please bring the details.
- **Property owned as joint tenants** usually passes to the surviving owner, regardless of what your will says.
- **In NSW, getting married generally revokes an existing will**, and divorce generally revokes gifts to a former spouse. If your relationship has changed, it's time to review your will.

| Section 3: Your wishes | |
|---|---|
| **Who inherits** | |
| ☐ | Who you would like to inherit your estate, and in what shares |
| ☐ | Any specific gifts of money or items to particular people |
| ☐ | Charities you would like to support (full name and ABN if you have it) |
| ☐ | What should happen if a beneficiary dies before you |
| **Other wishes** | |
| ☐ | Who should care for any pets |
| ☐ | Funeral, burial or cremation wishes |
| **Planning ahead – documents to consider at the same time** | |
| ☐ | Enduring Power of Attorney – who can manage your finances if you are unable to |
| ☐ | Appointment of Enduring Guardian – who can make health and lifestyle decisions for you |
| ☐ | Advance care directive – your wishes about future medical treatment |

## Questions for your lawyer

## *Ready to make or update your will?*

Our Wills & Estates team can prepare a clear, valid will tailored to your wishes, along with your Enduring Power of Attorney and Enduring Guardianship documents.

Call **1300 ALA LAW (1300 252 529)** Email **reception@alalaw.com.au**

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**Disclaimer:** This checklist provides general information only and is not legal advice. It is based on the law in New South Wales, which can change over time. Please seek advice from a qualified NSW Wills and Estates lawyer about your specific circumstances.