

MBT

WILL INSTRUCTIONS

YOUR DETAILS

NAME:.....

ADDRESS:.....

.....PHONE:

OCCUPATION:

EXECUTOR DETAILS

EXECUTOR NAME:.....

ADDRESS:.....

RELATIONSHIP (IF ANY):.....

EXECUTOR NAME:.....

ADDRESS:.....

RELATIONSHIP (IF ANY):.....

EXECUTOR NAME:.....

ADDRESS:.....

RELATIONSHIP (IF ANY):.....

ALTERNATIVE EXECUTOR DETAILS

APPOINT ALTERNATIVE EXECUTOR(S)? YES NO

ALTERNATIVE EXECUTOR NAME:.....

ADDRESS:.....

RELATIONSHIP (IF ANY):.....

ALTERNATIVE EXECUTOR NAME:.....

ADDRESS:.....

RELATIONSHIP (IF ANY):.....

FURTHER DETAILS

SPECIFIC GIFTS/BEQUESTS TO BE MADE: YES NO

DETAILS OF GIFT:.....

BENEFICIARY NAME:.....

BENEFICIARY ADDRESS:.....

RELATIONSHIP (IF ANY):.....

TO FORM PART OF RESIDUE IF PERSON DECEASED? YES NO

DETAILS OF GIFT:.....

BENEFICIARY NAME:.....

BENEFICIARY ADDRESS:.....

RELATIONSHIP (IF ANY):.....

TO FORM PART OF RESIDUE IF PERSON DECEASED? YES NO

DETAILS OF GIFT:.....

BENEFICIARY NAME:.....

BENEFICIARY ADDRESS:.....

RELATIONSHIP (IF ANY):.....

TO FORM PART OF RESIDUE IF PERSON DECEASED? YES NO

RESIDUE OF ESTATE TO BE DISTRIBUTED:

SHARE OF RESIDUE (e.g. half/third/etc):.....

BENEFICIARY NAME:.....

BENEFICIARY ADDRESS:.....

RELATIONSHIP (IF ANY):.....

SHARE OF RESIDUE (e.g. half/third/etc):.....

BENEFICIARY NAME:.....

BENEFICIARY ADDRESS:.....

RELATIONSHIP (IF ANY):.....

SHARE OF RESIDUE (e.g. half/third/etc):.....

BENEFICIARY NAME:.....

BENEFICIARY ADDRESS:.....

RELATIONSHIP (IF ANY):.....

ANY SELF-MANAGED SUPER FUND(S)? YES NO

IF YES, PROVIDE DETAILS:

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HAVE YOU MADE ANY PREVIOUS WILLS: YES NO

IF YES, PROVIDE DETAILS:

.....

DO YOU HAVE A CURRENT POWER OF ATTORNEY? YES NO

DO YOU HAVE A CURRENT APPOINTMENT OF ENDURING GUARDIANSHIP? YES NO

INSTRUCTIONS TAKEN AT: MBT OFFICE

OTHER PLACE:.....

OTHER MATTERS:.....

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.....

SOLICITOR ATTENDING:.....

CONFIRMATION OF INSTRUCTIONS:

It has been explained to me that, in advising me about the provisions in this Will, my adviser did not undertake to give me any advice on its taxation implications (including capital gains tax), and expressly advised me to seek expert advice on all such taxation implications. I acknowledge that MBT Lawyers did not undertake any responsibility in relation to the incidence of taxation on part or all of my estate, either to me, my estate or any person who is or might be interested in my estate.

I confirm that I have received advice with respect to these instructions and I have understood the meaning and significance of my Wills prior to the execution by me of my Will that will be prepared pursuant to these instructions.

SIGNATURE OF CLIENT:.....

DATED:.....