

# WILL APPLICATION FORM

( Appointment for one person only )



Public Trustee

## Tips for completing this form:

- *The details you provide here are essential to minimizing your time and expense at your appointment. They help us to assess how we can best help you and prepare before the appointment.*
- Please ensure you carefully read the other enclosed documents before completing this form.
- Please provide **only** the requested documents and details with the form.
- **This form is *not* intended to be a statement of what you may be considering for your Will. Those details will be discussed at the appointment. Incorrect or misleading information may cause extra expense and delay.**
- **Please call our Client Service Centre on 1300 746 116 if you need help to complete this form.**

## 1. Your Personal Details

Title (e.g. Mr, Mrs, Ms ...)	
Surname	
First & Middle names	
Any other name/s you are known by	
Occupation	
Residential Address	
Postal Address (if different to Residential Address above)	
Telephone Contacts	
Email Address	
Date of Birth	
Relationship Status (Tick <u>all</u> applicable)	<input type="checkbox"/> Married <input type="checkbox"/> De Facto <input type="checkbox"/> Single <input type="checkbox"/> Widowed <input type="checkbox"/> Separated <input type="checkbox"/> Divorced
Current Spouse/Partner's name	
Names and details of <u>all</u> previous Spouses/Partners	
	Indicate whether separated, divorced or predeceased, <u>and on what date/s</u> .
Do you have a Binding Financial Agreement (eg. Pre-nuptial Agreement) with a Spouse/Partner?	<input type="checkbox"/> No <input type="checkbox"/> Not sure <input type="checkbox"/> Not applicable <input type="checkbox"/> Yes <b>*See Important Note Below</b> If Yes, who with? :

\* **IMPORTANT NOTE: If you ticked an asterisked item, you may require professional legal and taxation advice that is beyond the scope of our Will preparation service. We will either contact you to clarify this before the appointment or discuss it with you at the appointment.**

Last Updated 20210701

## 2. **Executors under your Will:**

The Public Trustee drafts Wills that either nominate the Public Trustee as your one and only Executor, or nominate your spouse (or de facto partner) as your first executor and the Public Trustee as your substitute executor. In some exceptional cases, the Public Trustee may draft other Wills.

## 3. **Your Family Details:**

Details of **ALL** children **and** grandchildren must be provided here, even if you do not wish to include them in your Will or they are deceased, as some or all may be eligible to bring a claim against your estate.

<b>Do you have children?</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No (if 'No', go direct to Section 4 on next page.)
------------------------------	------------------------------	---

### **All Children from your Current relationship**

Provide these details for each Child: <ul style="list-style-type: none"> <li>• Full Name</li> <li>• Gender</li> <li>• Date of Birth</li> <li>• Address</li> </ul> <p>(If more space is required, please email additional details)</p>	
---	--

### **All your Other Children**

Provide these details for each Other Child: <ul style="list-style-type: none"> <li>• Full Name</li> <li>• Gender</li> <li>• Date of Birth</li> <li>• Address</li> </ul> <p>(If more space is required, please email additional details)</p>	
---	--

### **All your Grandchildren**

Provide these details for each Grandchild: <ul style="list-style-type: none"> <li>• Full Name</li> <li>• Gender</li> <li>• Date of Birth</li> <li>• Address</li> <li>• Name of the parent who is your child</li> </ul> <p>(If more space is required, please email additional details)</p>	
--	--

**Tip: If you have children under 18 ...** Consider who you might appoint as Guardian/s for children under 18 if the other parent dies before you. Once you have the agreement of your proposed Guardian/s, please bring their full details (e.g. full names, addresses, contact details) to your appointment.

#### 4. Other Details:

**All Other Potential Beneficiaries** (other than Spouse/Partner, Children or Grandchildren already mentioned above)

<p>Full Name, Address, Age and Relationship to you (eg. Friend)</p> <p>(If more space is required, please email additional details)</p>	
---	--

**Charities/Organisations you may wish to include in your Will:** Refer to the “*Important Information about your Will Appointment*” brochure for further charges that may apply.

Charity's Full Name	
---------------------	--

#### Existing Wills

Do you have a current Will?	<input type="checkbox"/> No <input type="checkbox"/> Yes, Will prepared by Public Trustee <input type="checkbox"/> Yes, other Will - please attach photocopy
Do you have a Mutual Will? (ie. An agreement binding you not to change your Will except by mutual agreement with another person)	<input type="checkbox"/> No <input type="checkbox"/> Not sure <input type="checkbox"/> Yes* - <b><u>See Important Note Below</u></b>

\* **IMPORTANT NOTE:** If you ticked an asterisked item, you may require professional legal and taxation advice that is beyond the scope of our Will preparation service. We will either contact you to clarify this before the appointment or discuss it with you at the appointment.

## 5. Your Assets and Liabilities:

	Details of each Item	Approximate Value
Assets in Sole Name e.g. House address/es, all bank account/s, car/s, caravan/s, boats etc, total value of other investments/share portfolio		
Liabilities in Sole Name e.g. Mortgage/s or credit cards and which bank/s		
Assets in more than one name PLUS name of joint owner		
Liabilities in more than one name e.g. Mortgage/s or credit card/s and which bank/s		

Do you have Superannuation?	<input type="checkbox"/> No <input type="checkbox"/> Yes – Name of Fund: <b>Attach</b> copy of latest Statement/s (eg. showing death benefit nomination/s)
Do you have a “SMSF”? (ie. a Self-Managed Superannuation Fund)	<input type="checkbox"/> No <input type="checkbox"/> Yes* - <b><u>See Important Note Below</u></b> If Yes, is the trustee a company? <input type="checkbox"/> Yes <input type="checkbox"/> No <b>Attach</b> copy of latest Member Statement.
Are you involved in a Family Trust or Discretionary Trust?	<input type="checkbox"/> No <input type="checkbox"/> Yes* - <b><u>See Important Note Below</u></b> If Yes, is the trustee a company? <input type="checkbox"/> Yes <input type="checkbox"/> No
Are you involved in a partnership, private company or other business?	<input type="checkbox"/> No <input type="checkbox"/> Yes* - <b><u>See Important Note Below</u></b> If Yes, then complete the following: - do you have a business? <input type="checkbox"/> Yes <input type="checkbox"/> No - what is the structure? <input type="checkbox"/> Sole trader <input type="checkbox"/> Company <input type="checkbox"/> Partnership <input type="checkbox"/> Trust - is the business to continue trading after your death? <input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have overseas assets? (You <b>must include details</b> of all overseas assets in the Joint and Sole Assets table above, stating the country where they are located.)	<input type="checkbox"/> No <input type="checkbox"/> Yes* - <b><u>See Important Note Below</u></b> Depending on your circumstances, any Will prepared by the Public Trustee may need to be restricted to Australian assets.
Do you live permanently in WA and intend to continue doing so?	<input type="checkbox"/> Yes <input type="checkbox"/> No* - <b><u>See Important Note Below</u></b>

**\* IMPORTANT NOTE:** If you ticked an asterisked item, you may require professional legal and taxation advice that is beyond the scope of our Will preparation service. We will either contact you to clarify this before the appointment or discuss it with you at the appointment.

## 6. Enduring Power of Attorney (EPA)

Do you already have an Enduring Power of Attorney?

- No   
  Yes, prepared by Public Trustee   
  Yes, other EPA - please attach copy

Do you wish to make an Enduring Power of Attorney appointing your spouse/partner?

(Please do not confuse this question with who you wish to choose as an Executor under your Will – see section 2 on page 2)

- No
- Yes - please read attached brochure on EPAs

Do you wish to make an immediate Enduring Power of Attorney appointing the Public Trustee?

(Please do not confuse this question with who you wish to choose as an Executor under your Will – see section 2 on page 2)

- No (please skip next section and go to the next page)
- Yes - please read attached brochure on EPAs and provide details on the following:
- Are you currently involved in any legal dispute?   
  No   
  Not sure   
  Yes – if so, please provide details:
  
  - How much income do you get per year before tax (include all sources. Eg. wages, superannuation pensions, Centrelink pensions, etc)

\* **IMPORTANT NOTE:** If you ticked an asterisked item, you may require professional legal and taxation advice that is beyond the scope of our Will preparation service. We will either contact you to clarify this before the appointment or discuss it with you at the appointment.



**7. Further Information**

Do you have a hearing or speech impairment? <input type="checkbox"/> No <input type="checkbox"/> Yes	
Do you have difficulty understanding new ideas or words when using the English language? <input type="checkbox"/> No <input type="checkbox"/> Yes <small>(If necessary and possible, we will provide a professional, independent interpreter free of charge. We cannot use a friend or relative.)</small>	
Do any beneficiaries have a disability or special needs?	<input type="checkbox"/> No <input type="checkbox"/> Yes - Details:
Do you have: <ul style="list-style-type: none"> <li>any disorder of mind; or</li> <li>any medical condition that could affect your memory or making your Will?</li> </ul> <small>(These details are very important to help us assess how best to meet your particular needs. Use reverse side of this page if more space required.)</small>	<input type="checkbox"/> No <input type="checkbox"/> Not sure – Details: <input type="checkbox"/> Yes - Details:
Did another person help you complete this form? (eg. Friend, Child, Accountant)  <small>(We will normally only see you alone. We will normally not allow others into the appointment.)</small>	<input type="checkbox"/> No <input type="checkbox"/> Yes – Provide name and relationship to you:

**Your Declaration**

The information provided in this form is true and correct to the best of my knowledge.

I am completing this form free of any influence or pressure from any other person.

I understand that this form provides background information only. It is not intended to be my Will.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**When you have completed this form, please email it together with any attachments to [PTOWillsAppointments@justice.wa.gov.au](mailto:PTOWillsAppointments@justice.wa.gov.au)**

**Alternatively you may post the form together with any attachments to Public Trustee - Wills Appointments, GPO Box M946 Perth WA 6843**

**\* IMPORTANT NOTE: If you ticked an asterisked item, you may require professional legal and taxation advice that is beyond the scope of our Will preparation service. We will either contact you to clarify this before the appointment or discuss it with you at the appointment.**