

# Important information about your Will appointment



Public Trustee

## Before your appointment

- ☐ **Please read the enclosed leaflets carefully.** These provide information about the Public Trustee's Will and Enduring Power of Attorney preparation services, as well as Deceased Estate Administration. This will help you determine if our services meet your needs.
- ☐ It is important to understand that **we charge fees for our services.** Please refer to the enclosed leaflet entitled 'Wills and Enduring Power of Attorney' for details. The Public Trustee drafts Wills that either nominate the **Public Trustee as your sole executor** or appoint your **spouse or de facto partner as the primary executor** with the Public Trustee as the substitute executor. Additional information about fees can be found in the leaflet 'Deceased Estate Administration'. These fees will be deducted from your estate after you pass away. In some circumstances, other charges may apply. For a full list of fees and charges, please consult the Public Trustee Scale of Fees document available at [publictrustee.wa.gov.au](http://publictrustee.wa.gov.au). All fees are subject to change without notice.
- ☐ **Take some time to consider** who you would like to name in your Will as:
  - beneficiaries (including any charities)
  - guardians for minor children.
- ☐ **If you have made a 'couple appointment', confirm whether this is appropriate for your situation.** Couple appointments are designed for co-habiting, married or de facto couples. If your circumstances or the details of your Wills differ significantly, we may need to consult with you individually, and separate fees for single consultations may apply. If you believe you need two single appointments instead, contact us as soon as possible.
- ☐ Please let us know if you have any disabilities or special needs that need to be considered when making your Will.
- ☐ If you need an interpreter, please let us know in advance so we can arrange an **independent interpreter**. For couples requiring an interpreter, note that each person is typically interviewed separately.
- ☐ Please **DO NOT** send in a draft Will or written instructions for making or changing your Will. These documents may be considered an 'informal Will' and could create complications with the administration of your estate if you do not proceed or if you pass away before your appointment. Your instructions will be discussed and documented during your appointment.
- ☐ **MOST IMPORTANTLY: Please complete and return the Will Application Form** (including copies of any requested documents) to the Public Trustee. Be sure to provide full names (including middle names), dates of birth and the relationship of any individuals you wish to benefit from your estate. Please contact us if you need help completing the form.
- ☐ Once the Will Application Form is returned, one of our Legal Officers will review it. If there are any issues, a Legal Officer will contact you to discuss them. Once reviewed, a Client Service Officer will call to book your appointment.

## About your appointment

### ☐ What do I need to provide?

#### ☐ Three forms of identification, including:

1. Current photo identification that includes your full name and date of birth (e.g. passport, driver's licence or proof-of-age card).
  2. Pensioner Concession Card, Health Care Card, Commonwealth Seniors Health Card or DVA Health Card (gold, white or orange). The WA Seniors Card is **NOT** accepted. You will only be eligible for the concession-holder fee if you present your card at your appointment.
- ☐ **Payment** is required on the day of your appointment. We accept cheque, Visa or Mastercard (and cash and eftpos at our Perth office). We **do not** accept American Express or other credit cards.

### ☐ How long does the appointment take?

A Will appointment for a single person can last up to 1½ hours, and up to 2 hours for a couple. Please allow sufficient time if parking in the city.

### ☐ Who can attend?

Family members, friends and carers are **not** permitted at the appointment while you are giving us instructions for your Will. To help both you and our professionals concentrate, and as a courtesy to other clients, we ask that you **do not bring children** to your Will appointment. Children often find discussions about death distressing and may struggle to sit quietly for up to 2 hours in our small interview rooms.

### ☐ Can someone else give instructions on my behalf?

We are unable to discuss instructions about your Will or your personal details with anyone other than you. If you are attending as a couple, **both** of you must be present for the entire appointment.

### ☐ What if I already have a Will with the Public Trustee?

The Public Trustee will have a copy of your previous Will. However, we now prepare Wills using a customised computer program. This means that your new Will may look and be worded differently to past Wills prepared by the Public Trustee. Regardless of whether you want to make major or minor changes, we need to obtain comprehensive details during your interview to ensure we have all the necessary, up-to-date information to ensure the new Will reflects your current wishes. Please do not send written changes or instructions in advance, as these will be discussed during the appointment.

### ☐ How soon will my Will be ready?

For in-office appointments, most Wills are ready at the end of your initial interview. Our staff can witness your Will and ensure it is correctly executed before you leave. Some Wills may take additional time to prepare so our staff will assist you in making another appointment. If an appointment is conducted over the phone, we will post your Will to you for signing.

**PLEASE NOTE:** If you are unable to meet these requirements, we may not be able to proceed with your appointment and/or this may result in additional fees and charges. The above processes are also subject to change as a result of public health advice.

**If you have any questions, need to reschedule, or wish to cancel your appointment, please contact Public Trustee Client Services on 1300 746 116 or email [PTOWillsAppointments@justice.wa.gov.au](mailto:PTOWillsAppointments@justice.wa.gov.au) as soon as possible.**