



All about you!

[you're fabulous and we'd love to know more about you! Please fill in (no need to print!) and return so we have your info before our initial consult!]

Client A

Client B

Personal

First name

Middle name

Last name

Preferred name

Aliases/former/
maiden names

Pronoun

Eg. He/his, she/her,
they/them

Are you of
Aboriginal and/or
Torres Strait
Islander origin?

Yes No Prefer not to disclose

Yes No Prefer not to disclose

*This information is only considered for advice that may be needed for your estate plan

Date of birth

Relationship
status

Married De facto Other: _____

Previous
spouse's name
(separated/divorced)

Occupation

Anything extra to
know about our
communication /
any supports you
might need

*eg. hearing impairment, sight impairment, language, or culture

Contact

Home address

Postal address
(if different)

Mobile phone

Work phone

Email

Children

1

Full name

Date of birth

Parents

Pronoun
Eg. He/his, she/her,
they/them

Their children's
names and ages
(ie. your
grandchildren)

Their spouse or
previous spouse

2

Full name

Date of birth

Parents

Pronoun
Eg. He/his, she/her,
they/them

Their children's
names and ages
(ie. your
grandchildren)

Their spouse or
previous spouse

3 Full name

Date of birth

Parents

Pronoun
Eg. He/his, she/her,
they/them

Their children's
names and ages
(ie. your
grandchildren)

Their spouse or
previous spouse

4 Full name

Date of birth

Parents

Pronoun
Eg. He/his, she/her,
they/them

Their children's
names and ages
(ie. your
grandchildren)

Their spouse or
previous spouse

5 Full name

Date of birth

Parents

Pronoun
Eg. He/his, she/her,
they/them

Their children's
names and ages
(ie. your
grandchildren)

Their spouse or
previous spouse

6

Full name

Date of birth

Parents

Pronoun

Eg. He/his, she/her,
they/them

Their children's
names and ages
(ie. your
grandchildren)

Their spouse or
previous spouse

Dependants

Dependants
(other than children
listed above)

Family

Your parents'
names and ages

Your siblings'
names and ages

Pets

Any furry,
feathered, or
scaly loved ones
you want to
include in your
estate plan
(please include
name, age, and
type of animal)

Superannuation

Superannuation fund/s

<u>Name of fund/s</u>	<u>Approx. value</u>

<u>Name of fund/s</u>	<u>Approx. value</u>

Self-managed superannuation fund/s (SMSF)

<u>Name of fund/s</u>	<u>Approx. value</u>

<u>Name of fund/s</u>	<u>Approx. value</u>

*Please provide a copy of the Super Fund Trust/ Settlement Deed and any Variations

Existing nominated beneficiary/ies (if you have them)

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*Please provide a copy of the Nomination/s

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*Please provide a copy of the Nomination/s

Life insurance

Life insurance

<u>Provider</u>	<u>Approx. value</u>

<u>Provider</u>	<u>Approx. value</u>

Existing nominated beneficiary/ies (if you have them)

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*Please provide a copy of the Nomination/s

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*Please provide a copy of the Nomination/s

Property

Principal place of residence, investment, and/or other property

<u>Address</u>	<u>Approx. value</u>	<u>Owner</u>	<u>% of ownership</u>

*If you have a title search (eg. from your conveyancer) confirming your ownership of the property please provide a copy

Other assets

Any other asset owned by you
Eg. bank accounts, shares, investments, vehicles, boat, caravan, jewellery, artwork, memorabilia

<u>Asset</u>	<u>Approx. value</u>	<u>Owner</u>	<u>% of ownership</u>

Do you have eggs, sperm, and/or embryo/s in storage?

Yes No Unsure

Yes No Unsure

Digital assets

Any digital asset owned by you
Eg. cryptocurrency, non-fungible tokens, online streaming and/or content

<u>Asset</u>	<u>Approx. value</u>	<u>Owner</u>	<u>% of ownership</u>

Liabilities/debts

Any liability/debt owed by you
Eg. mortgages, personal loans, car loans, leases, hire arrangements, credit cards

<u>Liability</u>	<u>Approx. value</u>	<u>Liable party</u>	<u>% of liability</u>

Overseas

Assets held outside Australia

<u>Asset</u>	<u>Approx. value</u>	<u>Owner</u>	<u>% of ownership</u>

Country asset/s held in

Does anyone you want to benefit from your estate live outside Australia?

Yes No Unsure

Yes No Unsure

Entities and business

Trust/s

*Please provide a copy of the Trust Deed and any Variations

Company/ies name & ACN

*Please detail whether you are a director, secretary, and/or shareholder. Please provide a copy of the Constitution.

Business/es & ABN

Existing estate plan

Do you have a Will?

Yes No Unsure

Yes No Unsure

Do you have an Enduring Power of Attorney?

Yes No Unsure

Yes No Unsure

Do you have an Advance Health Directive?

Yes No Unsure

Yes No Unsure

*Please provide a copy of your existing Will, Enduring Power of Attorney, or Advance Health Directive, if you have one

Extra working space/space for your notes

(Just in case)

YOU HAVEN'T INSTRUCTED US TO ACT FOR YOU YET [PLEASE NOTE]

We have not been engaged by you to prepare your estate plan as we do not have your full instructions. Following our initial consult, we will send you an email outlining various options to achieve your estate planning goals, along with our recommendations and the associated costs for each option.

Once you've decided on the approach you'd like to take, we will send you a Costs Agreement. This document outlines our professional fees and any costs related for your matter. It also provides important information about how we will work for you and manage your matter.

To formally engage our services and proceed with your estate plan, you'll need to sign and return the Costs Agreement. Until you have formally engaged us by signing a Costs Agreement, we are not acting for you in relation to your estate plan.

It's important to understand that if you cancel your appointment or do not sign a Costs Agreement with us and you lose capacity to make your estate plan documents or die before you make these documents, your final wishes and your choice about who will be able to make decisions for you may not be carried into effect.

We ensure our clients are well-informed about the next steps and timelines involved. If at any time you have questions please email or call us – we're here to help you.