

TRIPP, ROLLESTON & CO.

PARTICULARS FOR WILL

Surname _____ First Names _____
Full Legal Name

Address _____

Occupation _____ Birth Date _____ Place of Birth _____

MARRIAGE or DE FACTO PARTNER DETAILS *(complete where applicable)*

Full Legal Name of Spouse /Partner _____

Date of Marriage _____ Place of Marriage _____ Age _____ When Married

Previous Marriage Details

Previous Spouse Full Legal Name _____

Date of Marriage _____ Place of Marriage _____ Age _____ When Married

Dissolution Date _____

Clients Children *Full Legal Names*

Full Name _____ Date of Birth _____

Full Name _____ Date of Birth _____

Full Name _____ Date of Birth _____

Full Name _____ Date of Birth _____

Full Name _____ Date of Birth _____

Executor / Trustee *(this is the person/s who will administer your Will)*

Recommendation would be two executors and no more than three

Full Legal Name of Executor/Trustee

Surname _____ First Names _____

Address _____

Occupation _____

Full Legal Name of Executor/Trustee

Surname _____ First Names _____

Address _____

Occupation _____

Full Legal Name of Executor/Trustee

Surname _____ First Names _____

Address _____

Occupation _____

Guardian (if applicable) the person who will make legal decisions about your children's upbringing while they are under 17 years.
This is not necessarily who they will live with

Full Legal Name of Guardian

Surname _____ First Names _____

Address _____

Occupation _____

Funeral Instructions

I, wish to be Buried / Cremated

I, wish to be an Organ Donor / my body to be used for medical purposes

Special Requests Regarding Funeral Arrangements

Details of Disposition of Property – Any Particular Item/s to be Given to Any Particular Beneficiary

Specific Legacies / Bequests / Gifts of Money To eg an individual and/ or charity

Residue - Balance of Estate

Residuary Beneficiary Dies before you – What is to Happen?

Do you want the deceased beneficiary's share to go equally among the remaining beneficiaries, or do the deceased's children (i.e. your grandchildren) receive their parent's share

Family Trust Details

Other terms for Consideration/ Discussion Notes etc

