

# WOLLERMAN SHACKLOCK LAWYERS

*Your voice through our values of equality, respect and integrity.*

## Estate Instruction sheet

**Instructions:**

- Please circle yes or no as applicable.
- Please provide the additional information as indicated.
- If you do not know the answer or are unable to provide the additional information please insert the words 'not known'.
- Please sign where indicated at the foot of the final page and forward this completed list and all necessary information to the sender.

	QUESTION	ANSWER
<b>ABOUT YOU</b>		
<b>1</b>	Tell us a bit about yourself.	Name..... Address..... ..... Email..... Phone.....
<b>ABOUT THEM</b>		
<b>2</b>	What is the full name of the deceased?	Name.....
<b>3</b>	What was the date of death?	Date.....
<b>4</b>	Do you have the original death certificate?	Yes <input type="checkbox"/> No <input type="checkbox"/> If yes please bring the original certificate to our conference.
<b>5</b>	Is there any error on their death certificate?	Yes <input type="checkbox"/> No <input type="checkbox"/> Please provide details..... .....
<b>6</b>	What is the date of birth of the deceased?	DOB.....

7	What was the deceased's occupation?	Occupation.....
8	Who holds their original will? Is this their last will?	Please provide details..... Yes <input type="checkbox"/> No <input type="checkbox"/>
9	What is the executor's occupation?	Occupation.....
10	What is the deceased marital status?	Marital status.....
11	How many children did the deceased have? Please provide the following details.	<p>The deceased has no children <input type="checkbox"/></p> <p>Name.....</p> <p>Address.....</p> <p>.....</p> <p>Age.....</p> <p>Name.....</p> <p>Address.....</p> <p>.....</p> <p>Age.....</p> <p>Name.....</p> <p>Address.....</p> <p>.....</p> <p>Age.....</p>

<b>WHAT ARE THE DECEASED ASSETS?</b>	
12	<p>Real property at</p> <p>.....</p> <p>Accommodation bond?</p> <p>.....</p> <p>Bank accounts with?</p> <p>.....</p>

	<p>Account number?</p> <p>Motor vehicle/vehicles? Registration number/numbers?</p> <p>Shares with?</p> <p>Superannuation?</p> <p>Mortgage Investments?</p>	<p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>
13	<p>Does the deceased have an interest in any Trusts?</p>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If so please provide a copy of the Trust deed and balance sheet for the Trust.</p>
14	<p>Does the deceased have any interest in any companies?</p>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If so please provide the company name and number of shares.</p> <p>.....</p> <p>.....</p>
<b>INSURANCE/PAYMENTS/FEES</b>		
15	<p>Did the deceased have a Life Insurance Policy?</p> <p>Was the deceased earning any Centrelink payments?</p> <p>Was the deceased in receipt of a Veteran's affairs pension?</p>	<p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Who with? .....</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If so have they been cancelled? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>
16	<p>At the date of death what liabilities did the deceased have? E.g. Unpaid nursing home fees? Telephone account?</p>	<p>Please explain if any</p> <p>.....</p> <p>.....</p>

**WILL**

<b>17</b>	Do you think anyone is capable of challenging the deceased will?	Yes <input type="checkbox"/> No <input type="checkbox"/>
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**FINANCIAL**

<b>18</b>	<p>Did the deceased have an accountant/financial advisor?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If so please fill out the following.</p> <p>Name .....</p> <p>Address .....</p> <p>.....</p> <p>Contact details .....</p> <p>Are all the deceased's Tax returns up to date?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p>	
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**ANY QUESTIONS**

<b>19</b>	Please ask any questions.	<p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>
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**Signed by**

.....  
**Signed by**