

**Please complete a separate form for each person who wishes to make a Will.**

**Personal Information**

Full Name: \_\_\_\_\_  
*Last First Middle*

Also Known As: \_\_\_\_\_

Address: \_\_\_\_\_  
*Street Address*

\_\_\_\_\_ *City Postcode*

Home Phone: **(0 )** \_\_\_\_\_ Mobile Phone: **(02 )** \_\_\_\_\_

Email: \_\_\_\_\_

Occupation \_\_\_\_\_ Employer: \_\_\_\_\_

Birth Date: \_\_\_\_\_ IRD Number: \_\_\_\_\_

**Emergency Contact Information**

Full Name: \_\_\_\_\_  
*Last First Middle*

Address: \_\_\_\_\_  
*Street Address*

\_\_\_\_\_ *City Postcode*

Home Phone: **(0 )** \_\_\_\_\_ Mobile Phone: **(02 )** \_\_\_\_\_

Relationship: \_\_\_\_\_

**Prior Wills & Citizenship**

♦ Have you made a Will before?  Yes  No  
*If **yes**, tick this box if it is already held with Shanahans  otherwise please forward a copy of your existing Will to us (if possible).  
**Your new Will will cancel any existing Wills.***

♦ Do you have any assets outside NZ?  Yes  No  
*If **yes**, please specify what/where:* \_\_\_\_\_

♦ What is your Residency Status?  NZ Citizen  
 NZ Permanent Resident  
 Other (please specify): \_\_\_\_\_

♦ Are you a **resident or citizen** of any other country?  Yes  No  
*If **yes**, please state countries:* \_\_\_\_\_

♦ Are you a **tax resident** of any other country?  Yes  No  
*If **yes**, please state countries:* \_\_\_\_\_  
*and Tax Payer Number(s):* \_\_\_\_\_

**Marital Status & Children**

Marital Status:  Single  
 De facto relationship  
 Married / Civil Union  
 Engaged, soon to be married  
 Divorced / Separated  
 Other (please specify): \_\_\_\_\_

Spouse/Partner  
 Full Name: \_\_\_\_\_  
*Last* *First* *Middle*

Children to **above** spouse/partner?

Full Name of Child	Age

Children of **former** relationship?

Full Name of Child	Age

♦ Do you wish to appoint testamentary guardians of your children should you (and their other parent) die before they reach 18 years of age?  Yes  No

Full Name(s) of Guardian(s)	Address	Relationship to You

**Appointing an Executor**

**Who is an executor?**

The executor of your estate is the person/s who, after you pass away, is/are to carry out your wishes in accordance with your Will and ensure that each beneficiary receives their correct entitlement.

This person:

- should be someone you trust.
- must be over 18 years of age;
- may also be a beneficiary;
- is commonly a person's spouse or long-term friend.

You should discuss with your executor/s that you propose to appoint them. You may appoint up to four people to act as your executors but it is practical to appoint fewer where possible.

You may choose to include a successor executor in the event of your first executor/s passing away before you.

Please do not appoint an executor who resides outside New Zealand. This is currently preventing us from obtaining IRD Numbers for estates (which is required to complete compulsory estate tax returns).

There is space below for two executors. **If you require more than two executors, please continue on a separate page.**

**◆ Executor 1:**

Full Name:

\_\_\_\_\_

*Last* *First* *Middle*

Address:

\_\_\_\_\_

*Street Address*

\_\_\_\_\_

*City* *Postcode*

Home Phone: **(0 )** \_\_\_\_\_ Mobile Phone: **(02 )** \_\_\_\_\_

Relationship: \_\_\_\_\_

**◆ Executor 2:**

This executor:

- is to act jointly with Executor 1 above **OR**
- is to act as successor executor if Executor 1 dies before me.

Full Name:

\_\_\_\_\_

*Last* *First* *Middle*

Address:

\_\_\_\_\_

*Street Address*

\_\_\_\_\_

*City* *Postcode*

Home Phone: **(0 )** \_\_\_\_\_ Mobile Phone: **(02 )** \_\_\_\_\_

Relationship: \_\_\_\_\_

**Checklist of Major Assets**

♦ **Real Estate** (if jointly owned, please specify)

Address	Owners

**Note:**

1. Consider whether your property is held as "joint tenants" or "tenants in common" (i.e. ½ shares each).
2. If property is held as "joint tenants", then upon the death of one joint tenant, the surviving owner immediately takes ownership of the deceased owner's share and therefore the deceased owner's share does not pass in the Will of the deceased.

♦ **Shares**

Company Name	Description of Shares

♦ **Interest in Family Trusts**

Name of Trust	Description of Interest

♦ **Other Assets** (i.e. bank accounts, life insurance policies, Super and KiwiSaver) (state if bank accounts are joint and state if there is a nominated beneficiary of any policy)

Company Name	Description of Interest

♦ What is the estimated total value of all property listed above?: \$ \_\_\_\_\_

**Funeral/Burial/Cremation Directions**

If you have specific funeral directions, you should make these known to your executor/s and/or write them down on a separate note to be kept with your Will. Excluding those wishes from the Will will protect your executor if, for any reason, they are unable to carry out your wishes. You may also wish to consider a pre-paid funeral which you can arrange through most funeral directors.

- ◆ Do you wish to be:
  - Cremated
  - Buried
  - Donated to medical science (may need to contact hospital to record this)
  - Other (please specify):

- ◆ If you still wish to include specific funeral/burial/cremation directions (or some of them) after reading the note above, please include here:

**Specific Gifts/Bequests**

We will deal with the bulk of your estate in the "Beneficiaries" section of this form. This section provides for specific items/amounts you wish to give. Please note that giving items/amounts in this section may affect the overall amount your beneficiaries receive in the next section, depending on what remains in your estate when you die. This is because specific gifts are always applied first.

For example, if you have \$100,000 now and make a Will leaving \$10,000 to the SPCA and the rest of your estate to be divided equally among your four children, then the SPCA would receive \$10,000 and the remaining \$90,000 would be divided among your children\* (\*after payment of all estate expenses and costs). However, if, after making your Will, you spent \$70,000 and did not change your Will, then SPCA would still receive \$10,000 and the remaining \$20,000 would be divided among your children\*.

If you have a lot of sentimental items or furniture that you wish to give, you may wish to record them on a separate note to keep with the Will so that your executor is protected if there are any family disputes as to who gets what.

- ◆ Are there any specific personal effects or chattels that you would like to leave any person/s or charities?  Yes  No

If yes, please complete the following information:

Full Name and Relationship to You	Address	Description of Gift

- ◆ Are there any specific bequests of money or assets that you would like to leave any person/s or organisation/s?  Yes  No

*If yes, please complete the following information:*

Full Name	Address	Description of Gift or \$

- ◆ Do you wish to provide for any forgiveness of debts (e.g. family loans) or any other promise you have made to another person to leave property under your Will to them?  Yes  No

*If yes, please provide details:*

- ◆ If you are the settlor of a Trust, who do you nominate to have the power to remove/appointment trustees after you pass away?

Full Name	Address	Occupation and Relationship to You

**Beneficiaries**

**Who are beneficiaries?**

*The beneficiaries of your estate are the people you choose to inherit your estate when you pass away. They may be people or organisations (such as charities).*

- ◆ Other than the specific gifts you have left above, which of the following most appropriately sums up how you wish to leave your estate (*please tick one*):
  - Entirely to my partner identified above; **OR**
  - Entirely to my partner identified above. If my partner has died before me, to my children identified above in equal shares; **OR**

- To permit my partner to remain in the home during my partner's lifetime and, when he/she passes away then my share of the home to my children in equal shares. **All other assets to my partner** identified above;  
*Please select a life interest option below:*
  - The life interest should end when my partner enters into a new relationship or when he/she passes away (whichever comes earlier).
  - The life interest should end only when my partner passes away. **OR**
- To permit my partner to remain in the home during my partner's lifetime and, when he/she passes away then my share of the home to my children in equal shares. **All other assets to my children** identified above in equal shares;  
*Please select a life interest option below:*
  - The life interest should end when my partner enters into a new relationship or when he/she passes away (whichever comes earlier).
  - The life interest should end only when my partner passes away. **OR**
- To my partner and children identified above in equal shares between them; or
- To my children identified above in equal shares; **OR**
- Entirely to my partner identified above. If my partner has died before me, to the following people/organisations in the following shares;

Full Name	Address	Share (%)
<b>Total</b>		<b>100%</b>

**OR**

- To the following people/organisations in the following shares;

Full Name	Address	Share (%)
<b>Total</b>		<b>100%</b>

**OR**

- None of the above options. Please describe how you would like your estate left:

- ♦ If any of the above beneficiaries die before you, are you happy for their share to be divided equally among that deceased person's children?  Yes  No

*If no, please specify how the deceased's share/s is/are to be dealt with:*

**Person/s to be Excluded**

**Note:**

*This may be a person who has not received an inheritance in a Will but who considers themselves entitled.*

*This person may apply to the Court to have the Will overruled unless there is a specific reason given in the Will that they are not to benefit.*

*This could be a person who was substantially maintained by you being your parent, or a parent of your children, a minor or your partner.*



- ◆ Please provide details regarding any excluded persons in your Will. You should also specify if you have made any promises to anyone that they will be provided for in your Will if you have not in fact made provision for them.

**Other Notes**

- ◆ Is there anything else that you feel should be included in your Will?

**Signature**

**To Shanahans** *(please tick to confirm):*

- I understand that:
  - this form does not constitute a Will;
  - this form is intended to be a guideline for my wishes and the resulting Will may differ significantly depending on the advice you provide.
  - your engagement does not start until you have confirmed to me in writing that you have received my completed instructions.
  
- I have included with this form, a colour copy of one of the following forms of identification:
  - current NZ Driver's Licence
  - current Passport
  - current Firearms Licence
  - Other *(please specify):*

.....  
**Signature**

.....  
**Print Full Name**

**Date:** \_\_\_\_ / \_\_\_\_ /20 \_\_\_\_

Once completed and signed, please forward this form and copy identification to:  
Shanahans Law Limited  
PO Box 15149  
New Lynn  
**Auckland 0640**

**OR** email to: [mary@shanahanslaw.co.nz](mailto:mary@shanahanslaw.co.nz)