

**INSTRUCTIONS FOR WILL
& POWERS OF ATTORNEY
TO BE PREPARED BY
MELLOR OLSSON LAWYERS**

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WILL INSTRUCTION SHEET

Full name(s) of person(s) making Will:

Where do they live:

Phone:

Occupation:

(Please note that occupations such as Pensioner and Retired are not acceptable to the Probate Office. If a person is retired, find out what they previously did, eg. Retired Bank Manager)

Date of Birth:

Details of family:

Spouses full name *(if not shown above)*:

Full name of and ages of all children:

Are there any grandchildren:

Are there any children from a previous relationship:

DISCRETIONARY TRUSTS

Name of Trust:

Full name of Trustee:

Who is Appointor:

What happens to Trust on death of person making will:

Loan account to be forgiven:

FURTHER INFORMATION

Brief Summary of Assets:

(Real Estate - how held - 'joint tenants' or 'tenants in common'. Can be important in the disposition of property)

Who is to be the Executor:

(Name, address and relationship to person(s) making will)

Are there any Specific Requests:

Are there any Cash Legacies:

Who is to receive Everything Else:

Are there to be any substitutions:

(If so, are children or grandchildren to take at 18 years, 21, or 25 years)

Guardian for Infant Children:

INSTRUCTIONS FOR ENDURING POWERS OF ATTORNEY

Full Name, Address and Occupation of Donor
(Person giving the Enduring Power of Attorney)

Full Name, Address and Occupation of Donee(s)
(Person or persons to whom the Enduring Power of Attorney is to be given. If a relative, please state relationship)

Is the Enduring Power of Attorney to be exercisable: *(Delete One)*

- 1. From the date of signing, or**
- 2. Used only if donee loses legal capacity**