WILL AND EPOA

**DATA CAPTURE FORM**

1. ***Who is to be your Enduring Power of Attorney and Executor?***

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| 1. | Who is to be your Enduring Power of Attorney and Executor? This may be held jointly by one or more persons. If you want different persons for the roles, insert in the box below the name of those persons but for simplicity and safety it is best to have one person or persons doing the same role. |
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| 2. | In the event that none of your EPOAS or Executors are able to fulfill their duties because of sickness, incapacity or death, who is to be your second EPOA and Executor? This may be held jointly by one or more persons. If you don’t want a second line of EPOAs or Executors, just insert in the box below “NA”. |
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| 3. | In the event that none of your first or second line EPOAS or Executors are able to fulfill their duties because of sickness, incapacity or death, who is to be your third line of EPOA and Executor? This may be held jointly by one or more persons. If you don’t want a third line of EPOAs or Executors, just insert in the box below “NA”. |

1. ***Enduring Powers of Attorney***

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| Your EPOA will look after your personal and financial needs and if you have a SMSF, can act as a Trustee of the SMSF. You can give them unfettered control or provide limits – such as “ensure that any health care is of the highest standard” just to provide them with some guidance. If you would like to put in some guidance including what not to do, then insert this in the box below: |
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1. ***Wills – Specific Gifts before the rest of the Estate***

After appointing a chain of Executors to manage your estate, the next step is to guide your Executor with your desire to make a specific gift to a spouse, child, grandchild or other person. Once this is done and the gifts are made, anything left over forms the remaining estate which may be passed in its entirety to a spouse or children individually or to be shared. Importantly specific gifts rank higher in importance than the remaining estate, so we recommend spending time on specific gifts.

The first step then is to look at specific gifts. Do you want to make any specific gifts to any person – such as “My investment property at 5 Smith Street Collingwood Vic is to go equally to my eldest daughter Jane” or “My sister Jonie Smith is to receive $100,000” or “All my estate is to go to my wife Janelle” or “My Executor is to distribute my personal effects and jewelry in a fair and reasonable manner.”

*Feel free to make as many bequests as you want – the more specific gifts you complete it makes the role of the Executor that much easier and faster.*

**Specific Bequest** – this provides your Executor with the authority to transfer property, shares, jewelry, cash or a percentage of all of your assets, after any specific bequests to a certain person or group of persons. Please be as specific as possible and identity the assets and persons which may include a charity and does not have to be only persons or charities resident in Australia.

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| 1. | Specific Bequest No 1 |
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| 2. | Specific Bequest No 2 |
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| 3. | Specific Bequest No 3 |
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| 4. | Specific Bequest No 4 |
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1. ***Wills and the remaining Estate***

If there are any assets or monies left over after paying all expenses of the estate and also paying out all specific gifts, then the remainder of the estate, called the residual estate, is to pass to the main beneficiaries if they are alive.

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| a. | Who are the main beneficiaries, and if more than one are they to take the remainder of the estate equally or what specific percentages would you like for each person? |
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| b. | If the main beneficiaries are not alive, then who are the next in line to receive the remaining estate? |
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| c. | If the second line of estate beneficiaries are not alive, then who is to receive your estate? |
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