

Fact finder and instructions for Mirror WILLS

Client and Beneficiary Details sheet

SPOUSE (A) PERSONAL DETAILS		SPOUSE (B) PERSONAL DETAILS			
Surname _____ Title _____		Surname _____ Title _____			
Given names _____		Given names _____			
Occupation _____		Occupation _____			
Born / / Place of Birth: _____		Born / / Place of Birth: _____			
Marital status: (M)arried / De (F)acto <input type="checkbox"/>		Residential Address: _____			
Phone (H) _____ (B) _____		Postcode: _____			
(Mob) _____ Postal address _____					
e-mail: _____		Other _____			
CHILDREN OF CURRENT RELATIONSHIP					
Full Name & Address	Age	Full Name & Address	Age		
Full Name & Address	Age	Full Name & Address	Age		
Full Name & Address	Age	Full Name & Address	Age		
CHILDREN OF ANY PREVIOUS RELATIONSHIP/S					
Spouse A		Spouse B			
Full Name & Address	Age	Full Name & Address	Age		
Full Name & Address	Age	Full Name & Address	Age		
Full Name & Address	Age	Full Name & Address	Age		
DECEASED CHILDREN					
Spouse A		Spouse B		Both	
Full Name	Children?	Full Name	Children?	Full Name	Children?
OTHER BENEFICIARIES (To be named in Will)					
Relationship					
Full Names	To Spouse A		To Spouse B		Age

Asset Details sheet

Real Estate					
	Address	Mortgaged Y/N	Ownership Spouse A/B / Joint	Value (approx) \$	
1					
2					
3					
4					
Household Furniture and Effects					
	Location address	Ownership Spouse A/B/Joint			
1					
2					
3					
Motor vehicles, Caravans, etc.					
	Description	Ownership Spouse A/B/Joint			
1					
2					
3					
Bank Accounts					
	Name of Bank, Credit or Building Society, or other Financial Institution	Ownership Spouse A/B/Joint	Account Type	Value \$	
1					
2					
3					
4					
Superannuation					
	Name of Super Fund	Private/ Employer Sponsored	Ownership Spouse A or B	Nominated Beneficiary	Value (approx) \$
1					
2					
3					
Life Assurance					
	Name of Company	Whole of Life/ Term/Other	Ownership Spouse A or B	Value (approx) \$	
1					
2					
3					
Investments					
	Name of Company	Number/ Face Value	Ownership A/B/Joint	Value (approx) \$	
1					
2					
3					
4					
5					
Other Assets					
	Eg. Loans to family members (provide written evidence of terms and who lent to), Interest in Partnership, Family Company/Trust, Farming / other business assets.	Ownership A/B/Joint	Value (approx) \$		
1					
2					
3					
LIABILITIES					
	Description	Liability Testator /Joint	Amount due \$		
1	Secured loans (e.g. Mortgages)				
2	Unsecured loans <ul style="list-style-type: none"> ▪ Credit cards (name of institution) ▪ Loans owing to family members/others (provide details if to be included in Will) 				

Will Particulars sheet

EXECUTORS AND TRUSTEES

Primary Executor(s)

Full Name	Address	Relationship to Spouse A	Age

Substitute Executor(s)

Full Name	Address	Relationship to Spouse A	Age

SPECIFIC GIFTS OR CASH GIFTS

Spouse A or B	Describe Gift or Amount of Cash	Beneficiary name	Does gift take effect (1) On your death or (2) On death of your spouse

DISTRIBUTION OF ESTATE (Residue)

1	Do spouses wish whole estate to be left to each other in the first instance?	Y/N	
2	On Death of both, is whole estate to pass to children equally? If not use Alternative Distribution below	Y/N	
3	If minor children may be involved, is preferred age 18 years? or years		
4	Are children to be named? (if no more children expected)		
5	If any child dies before parent, are their children to take deceased parent's share by substitution? At what age? 18 years? or years		

ALTERNATIVE / OTHER DISTRIBUTION

	Share %	Beneficiary name	Relationship To Spouse A	Failure to Vest to nominated beneficiary. Substitution?
1				
2				
3				
4				
5				
6				
7				
8				

OTHER DISTRIBUTIONS OR TRUSTS – Insert details of requirements

FUNERAL WISHES

Spouse A	
Spouse B	

APPOINTMENT OF GUARDIANS

Name	Address	Relationship to Spouse A

