

# Business Results Limited

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## WILL INSTRUCTION SHEET

**TO** (Your Solicitor)

In disposing of your assets on your death, you must consider your family and any other people who may be dependent on you or you may have an obligation to. These instructions are for a standard Will leaving a life interest in your estate to your husband or wife, but, if he/she does not survive you, for your children. If you require any changes to this standard format please provide details on the reverse. If you feel this sheet is inadequate, please phone us.

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**A. FULL NAME**.....(Testator/Testatrix)  
(CHRISTIAN NAMES) (SURNAME) M F

**B. HOME ADDRESS AND OCCUPATION**.....  
.....Telephone No:.....

**C. OTHER DETAILS**

Husbands/wife's full name.....D O B.....

Children's names in full.....D O B.....

.....D O B.....

.....D O B.....

Any children adopted  
by Court Order .....D O B.....

Any children informally  
Adopted .....D O B.....

**D. FUNERAL: BURIAL /CREMATION** (delete one)

**Any special**

**Directions**.....

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**E. TRUSTEES/ EXECUTORS**

To ensure your estate is managed, your trustees should be a professional independent person and a family member who you trust

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**F. SPECIAL GIFTS** (Full name of donee; full description of each item gifted)

.....to.....

.....to.....

.....to.....

**G. WHERE THE REST GOES**

Everything else to

.....

If I predecease my spouse a life interest to that spouse otherwise to children/grandchildren below:

But nothing to

.....

(Named person)

E.g. husband/wife or other

Children equally/ other shares if not equally (delete one).....

If children die before then to grandchildren Yes/No

Other Yes/No

.....

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**H. ASSETS- Please list and assess values**

(a).....\$

(b).....\$

(c).....\$

(d).....\$

(e).....\$

(f).....\$

Maori land interest in.....District

(g).....\$

**I. GUARDIANS FOR YOUR CHILDREN** (If below the age of consent)

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**J. ANY SPECIAL POINTS OR REQUESTS**

1. Do you want to donate your organs? Yes  No

2. Charitable Gifts? Yes  No

Charity.....

.....

.....

3. You should forgive any debts still owing to your Family Trust Yes  No

4. Who will take the Power of Appointment of Trustees in your Family Trust?

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6. Trustee to follow Memorandum of Wishes

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7. Any other points you would like to discuss

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