

## Will Preparation Worksheet

To start the process of preparing a Will, simply fill out this form and return to us by email to [office@hometransfer.nz](mailto:office@hometransfer.nz) or in person at one of our branches.

For more information regarding Wills see [www.hometransfer.nz](http://www.hometransfer.nz)

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### PERSONAL INFORMATION

FIRST NAME \_\_\_\_\_ MIDDLE NAME \_\_\_\_\_  
LAST NAME \_\_\_\_\_ DATE OF BIRTH \_\_\_\_\_  
STREET ADDRESS \_\_\_\_\_  
CITY \_\_\_\_\_ OCCUPATION \_\_\_\_\_  
EMAIL \_\_\_\_\_ PHONE \_\_\_\_\_

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### PERSONAL REPRESENTATIVES

Enter the details of the person(s) you want to be your Trustees and Executors (now known as Personal Representatives)

FIRST NAME \_\_\_\_\_ MIDDLE NAME \_\_\_\_\_  
LAST NAME \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
RELATIONSHIP \_\_\_\_\_ OCCUPATION \_\_\_\_\_

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FIRST NAME \_\_\_\_\_ MIDDLE NAME \_\_\_\_\_  
LAST NAME \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
RELATIONSHIP \_\_\_\_\_ OCCUPATION \_\_\_\_\_

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## BENEFICIARIES

Enter the details of the person(s) you want to be your Beneficiaries

FIRST NAME \_\_\_\_\_ MIDDLE NAME \_\_\_\_\_

LAST NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

RELATIONSHIP \_\_\_\_\_ OCCUPATION \_\_\_\_\_

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FIRST NAME \_\_\_\_\_ MIDDLE NAME \_\_\_\_\_

LAST NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

RELATIONSHIP \_\_\_\_\_ OCCUPATION \_\_\_\_\_

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FIRST NAME \_\_\_\_\_ MIDDLE NAME \_\_\_\_\_

LAST NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

RELATIONSHIP \_\_\_\_\_ OCCUPATION \_\_\_\_\_

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FIRST NAME \_\_\_\_\_ MIDDLE NAME \_\_\_\_\_

LAST NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

RELATIONSHIP \_\_\_\_\_ OCCUPATION \_\_\_\_\_

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Details of the person(s) you wish to be given your estate should all beneficiaries listed above pass away before you

FIRST NAME \_\_\_\_\_ MIDDLE NAME \_\_\_\_\_

LAST NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

RELATIONSHIP \_\_\_\_\_ OCCUPATION \_\_\_\_\_

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FIRST NAME \_\_\_\_\_ MIDDLE NAME \_\_\_\_\_  
LAST NAME \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
RELATIONSHIP \_\_\_\_\_ OCCUPATION \_\_\_\_\_

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### **TRUST DETAILS**

Enter the name of your Trust if applicable. Please also include the Trust Deed

NAME OF TRUST \_\_\_\_\_

### **SPECIFIC GIFTS**

Enter the details of any specific gifts you wish to give your beneficiaries

SPECIFIC GIFTS \_\_\_\_\_

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### **SHARE OF ESTATE**

Enter the details of the share of your estate each beneficiary will receive

SHARE OF ESTATE \_\_\_\_\_

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**GUARDIAN OF CHILDREN**

Enter the details of the person(s) you wish to be the guardians of your children

FIRST NAME \_\_\_\_\_ MIDDLE NAME \_\_\_\_\_

LAST NAME \_\_\_\_\_

STREET ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ OCCUPATION \_\_\_\_\_

**FUNERAL DETAILS**

Enter any funeral details, including if you would like to be cremated or buried

FUNERAL DETAILS \_\_\_\_\_

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\_\_\_\_\_  
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Please return this form to [office@hometransfer.nz](mailto:office@hometransfer.nz) or in person at one of our branches.  
For more information on Wills or to locate a branch, visit our website  
[www.hometransfer.co.nz](http://www.hometransfer.co.nz)