



Public Trustee for the Northern Territory

PERSONAL DETAILS FOR WILL INSTRUCTION

WILL STATUS

Form with three checkboxes: New Will, Change to Will previously prepared by Public Trustee, Change to Will not previously prepared by Public Trustee

Appointment Date: _____

CLIENT DETAILS

Form for client details including Name, Residential Address, Occupation, Date of Birth, Postal Address, Place of Birth, Marital Status, Telephone Home, Work, Mobile, and Email.

NEXT OF KIN

Form for next of kin details including Name, Postal Address, Relationship, Date of Birth, Telephone Home, Work, Mobile, and Email.

CHILDREN OF CURRENT RELATIONSHIP

Table with 3 columns: Full Name of Living Children, Address, Date of Birth. Multiple rows for listing children.

CHILDREN OF ANY PREVIOUS RELATIONSHIP/S

Full Name of Living Children	Address	Date of Birth
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

DECEASED CHILDREN

Full Name of Deceased Children	Date of Death	Names of Children of deceased Children
_____	_____	_____
_____	_____	_____
_____	_____	_____

NAME OF BENEFICIARIES IF DIFFERENT FROM ABOVE

Full Name of Other Beneficiaries	Address	Relationship
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

REAL ESTATE

Principal Residence	Owned	Rented	Mortgage	Ownership
Address _____	Yes / No	Yes / No	Yes / No	Sole / Joint / TIC

Investment Property				
Address _____	Yes / No	Yes / No	Yes / No	Sole / Joint / TIC

Address _____	Yes / No	Yes / No	Yes / No	Sole / Joint / TIC

HOUSEHOLD FURNITURE & EFFECTS

Household furniture and effects in Principal Residence are owned as Sole / Joint

Household furniture and effects in Investment Property are owned as Sole / Joint

VEHICLES / BIKES /CARAVAN /BOAT/FARM EQUIPMENT/ETC

Make / Type / Year

Ownership
Sole / Joint
Sole / Joint
Sole / Joint
Sole / Joint

ANTIQUES/ JEWELLERY / COLLECTIONS /ETC

BANK ACCOUNTS / CREDIT UNIONS

Bank / Other Financial Institution

Branch

Ownership

<hr/>	<hr/>	Sole / Joint
<hr/>	<hr/>	Sole / Joint
<hr/>	<hr/>	Sole / Joint
<hr/>	<hr/>	Sole / Joint

INVESTMENTS

Shares / Debentures / Unit Trusts / Bonds

Ownership
Sole / Joint
Sole / Joint
Sole / Joint
Sole / Joint

FINANCIAL / TAX INFORMATION

Name of Financial Advisor: _____ Name of Tax Agent: _____

Location of Important Documents: _____

SUPERANNUATION

Superannuation / Company or Fund

Nominated Beneficiary

LIFE ASSURANCE

Company

On life of

LOANS TO FAMILY / FRIENDS

Recipient

Amount

Terms / Written Evidence (Y/N)

PREPAID FUNERAL

Funeral Company / Fund

Details

PARTNERSHIPS / BUSINESSES / TRUSTS / PRIVATE COMPANIES / OTHER ASSETS

OTHER PERSONAL DEBTS (HECS, PERSONAL LOANS, HIRE PURCHASE, CHILD SUPPORT)

IMPORTANT PRIVACY STATEMENT

The Public Trustee's Office is authorised by the Public Trustee Act to prepare wills and collects the information on this form for the purpose of drafting wills. Some of the information obtained may be provided to members of the public and other interested persons for the purpose of maintaining the Wills Register established under section 49 of the Wills Act. This information does not include the contents of the will, but may include those details required by section 50 of the Act, namely the name of the testator or testatrix, and in some circumstances the date of the will, address of the testator and name and address of the executor or executrix – generally only sufficient detail to establish the existence of a will.

Should the information on this form not be provided, the Public Trustee is unable to prepare the will. Authorised persons can access personal information provided on the form upon request. Please contact the Deputy Public Trustee on 08 89996164 or write to GPO Box 470 Darwin NT 0801.