

# Ghs

## LEGAL

### Wills & Estate Lawyers

ABN 621 346 488 38

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## ESTATE PLANNING INSTRUCTION SHEET

### CLIENT DETAILS

Surname(s)

Given Names

Residential

Address

Postal Address

(if different)

Contact Details

(Business)

(Mobile)

(Home)

(Email)

Principal Office:  
Level 5 /22 Market Street  
Sydney NSW 2000  
PO Box Q1701 Queen Victoria Building Post Office  
Sydney NSW 1230

Port Macquarie -By Appointment  
Tel: [02] 9262 5877  
Fax: [02] 9262 1771

Email: [gsmith@gregorysmithlaw.com.au](mailto:gsmith@gregorysmithlaw.com.au)

**Personal Circumstances**

Status of domestic relationship

Married / Partnered / Marriage Contemplated/ Single / Widowed/

Separated/ Divorced

Name of spouse or partner (if estate planning is being done separately):

Names, Ages & Addresses of Children/Intended Beneficiaries (if any)

Details of stepchildren (if any):

Details of any other financial dependants (if any):

Details of existing or anticipated executorships (IE IN OTHER WILLS)

Existing Will(s), power(s) of attorney and any binding or non-binding relationship agreements

Deeds for self managed super funds & family trusts (and copies of family trust elections)

Most recent statements of financial position for family trusts/ companies, including loan accounts

Details of any personal guarantees

Partnership/shareholder/other intra business agreements

## **OWNERSHIP OF INVESTMENT ASSETS**

### **“Non-Super” Assets**

eg family home, shares portfolio, business

Owner, eg joint, family trust

Value

Debt

CGT

Name(s) of **Superannuation Fund(s)**

If an SMSF, show all member balances

Current

Balance

Binding nominations or binding directions ?

**Life Insurance** – Insurer Type of cover, eg

death, TPD, trauma

Nominated Beneficiary

eg super fund, self owned

Level of Cover \$

**Transfers of assets** that need (or may need) to be

anticipated/taken into account (if any) eg lifetime gifts; loans to family members

**Ownership of Business Assets**

Details shareholder and funded “buy-sell” agreements

Business Owner eg family trust

Estimated Value

Debt

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Date