

Will Questionnaire

By completing and submitting this questionnaire you are instructing us to prepare a draft Will. Once submitted the information provided to us is the subject of privilege and as such the information remains confidential at all times and will be destroyed or returned to you if requested.

The more information that you provide to us the greater the accuracy of your Will. If you require a quote for us preparing your Will, please call us on 03 6332 9353 or use our 'Contact Us' form

(<http://www.cormistonlegal.com.au/contact>) and we will call you.

Once you have completed this form, please scan and email it to us at office@cormistonlegal.com.au

| Personal Information | |
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| Full name and address (including middle names and residential address). | Full Name: Address: |
| Your preferred contact details including mobile phone, home phone, work phone & email address. | Phone Numbers: Email: |
| Are you married or in a de facto relationship? If so please provide the full name of your partner. | Married: Yes/No Defacto: Yes/No Full name of partner: |
| Do you have any children? Please provide their full name (including middle name) and age. | Children: Yes/No If yes please advise their full names: |
| Have you been married before? Are there children from that relationship? Please provide details. | Previously married: Yes/No Full names of any children from that marriage: |
| Your Assets - Property | |
| Do you own your home? If so what is the address and whose names are on the title? | Home owner: Yes/No Yes/No Address: Owners: |

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| If more than one owner, is the property owned as joint tenants or tenants in common? | Joint tenants: Yes/No Tenants in common: Yes/No |
| List any other properties you own including the address of the property. | Property address: Names of owners: |
| Other entities - Family Trust | |
| Do you have a family trust? If yes, list the assets owned by the trust. | Family Trust: Yes/No Yes/No Assets: |
| Who is the Trustee of the Trust? (Trust assets do not form part of your estate). | Name of Trustee: |
| Who do you want to give control of the Trust to under your Will? | Full name: |
| Other entities – Investment in a private company or business | |
| Do you have a Company? | Yes/No |
| What assets does the company own? | Assets: |
| Who are the directors and shareholders? | Directors: Shareholders: |
| Who do you want to take control of the company on your passing? | Name: |
| Other entities – Investment in a business | |
| Do you own a business and if so what is the ownership structure? | Yes/No Sole Trader/Company/Family Trust/Other: Full legal name of owner: |

