

ESTATE PLANNING

Will application | Your details

Full legal name

Date of birth

State / jurisdiction

Mailing address

Email (optional)

Spouse / partner and children

ESTATE PLANNING

Will application | People you choose

Primary executor / trustee

Alternate executor / trustee

Guardian wishes for minor children

Contact details for nominated people

ESTATE PLANNING

Will application | Your wishes

Beneficiaries and intended shares

Specific gifts / distribution wishes

Asset summary (omit account numbers)

Additional instructions / questions