

Will and Powers of Attorney Appointment Checklist

This checklist is designed to help ensure you can make the best use of your time when you meet with us regarding your new will and power of attorney.

What to think about before your appointment

It may be helpful for you to turn your mind to the following before your appointment; you do not need to make any decisions before meeting us but having a think about these items will enable us to discuss them with you productively.

Your assets and liabilities	Having a rough idea of what are your current assets and liabilities, including superannuation
Executors	Who would you like to be the executors of your will? Bring their full legal and correctly spelt name and address.
Beneficiaries	The full legal and correctly spelt name and address of anyone you would like to receive something in your Will.
Guardianship	Your wishes in relation to who you would like to care for any of your children aged under 18 years, including their full legal and correctly spelt name.
Managing your finances	For a power of attorney, how you would like to manage your financial affairs if you are unable to.
Managing your medical decisions	For a power of attorney, who you would like to make decisions regarding your medical treatment if you are unable to.

What you should bring with you on the day

House	The current balance of your mortgage and a rough idea of the value of your house (no need to get a valuation or appraisal, just your own idea)
Vehicles (include cars, caravans, boats, motorbikes)	Whether there are any loans against any of your vehicles and who the loan is from. If you wish to gift specific vehicles, please bring the model, year and registration details.
Bank accounts/ Term deposits	Approximate balances of your investments/bank accounts.
Other liabilities	Details of any other loans, leases, credit cards.

Superannuation	<p>Copies of your most recent superannuation statements for each superannuation fund</p> <p>– if you don't have a recent statement, contact the super fund and they should be able to provide it.</p> <p>If you have a self-managed superannuation fund:</p> <ul style="list-style-type: none"> • A copy of the trust deed for the superannuation fund • The most recent financial statements of the superannuation fund
Family and other trusts	Copy of trust deed and the most recent financial statements of the trust
Companies/partnerships	Details of any companies in which you are a shareholder or director.
Shares	A list of shares held in your name.
Insurance	Details of any life or funeral insurance policies you hold including any named beneficiaries.
Overseas Assets	Details of any property or funds you may have overseas.
Other assets	<p>Details of any other ways in which you own assets including:</p> <ul style="list-style-type: none"> • Online betting accounts • Paypal accounts
Liabilities	Details of any liabilities relating to the above.
Jewellery, collectables furniture and other special items	Details and approximate values of specific items that might need a separate mention in your will (especially those of higher and/or sentimental value).

6d Finally, remember to bring your reading glasses if you need them.