

## Thank you for taking the first steps to protect you and your loved ones with an estate plan.

This estate planning personal information form is a guide to provide us with information about your assets and family, so we can provide you with the best estate planning advice tailored to your circumstances.

Completing the form **before your appointment** will save time and minimise the need for follow-up appointments.

If you have any trouble completing your form, please do not worry, return the document with as much information as you can complete and we can discuss and gather more information at your appointment.

This form has multiple sections, however, please note that some sections may not apply to you and will not require information.

### How to return this form

- You can return an electronic or scanned copy of this form to [bsu@publictrustee.tas.gov.au](mailto:bsu@publictrustee.tas.gov.au)
- You can post the form to GPO Box 1565, Hobart 7001  
*(Please allow sufficient time for the document to arrive before your appointment)*
- Alternatively, if you are unable to do either of the above options, please drop the document into your local office.

### Why does the Public Trustee need this information?

To ensure your estate is distributed the way you intend and to minimise the risk of your Will being challenged, we need to know:

- what assets and liabilities you have;
- how you own assets and
- the estimated value of your assets.

For example – how you own your assets (such as your home or bank account) will determine who you can leave that asset to. Information on the value of your assets or liabilities will help determine if certain gifts are possible or if the estate is distributed 'fairly' or the way you intend.

**CALL US ON 1800 068 784 VISIT US AT [www.publictrustee.tas.gov.au](http://www.publictrustee.tas.gov.au)**

**Email:** [tpt@publictrustee.tas.gov.au](mailto:tpt@publictrustee.tas.gov.au) **Fax:** (03) 6235 5255

GPO Box 1565, Hobart, TAS 7001 ABN 11 223 649 773

**YOUR NEAREST PUBLIC TRUSTEE LOCATION:**

**HOBART LAUNCESTON DEVONPORT**

## Do any of the following apply to you?

### **Important – please read before you continue with this form**

**In some situations, you may need specialised legal advice before going ahead.**

**If any of the situations below apply to you, please call us before you complete this form. We can explain your options and help you decide what to do next.**

**1800 068 784**

**You have a Self-Managed Superannuation Fund (SMSF)**

This means your super is managed through a private trust set up with a legal document called a trust deed. SMSFs have special rules and usually need extra advice.

**You have an existing Family Trust**

This means your assets or income are held in a trust for family members. Family trusts are separate legal arrangements and need careful planning.

**You want someone to live in or use your home for a period of time**

This means you want to give someone the right to live in your home for their lifetime or for a set number of years, even though they may not own it or they own it jointly with you. This is sometimes called a right of residence or life interest.

**You want to set up a Discretionary Trust**

This means you want a trust that gives flexibility over who receives income or assets, often to help protect assets or reduce tax for your beneficiaries.

**You own or are part of a business with other people**

This means you have a business interest in a partnership or a company. These businesses usually have legal agreements that affect what happens when you die.

**You run a sole trader business that will continue after your death**

This means you are the only owner of a business, and you want it to keep operating after you die, rather than winding up on death.

**You own significant assets overseas**

This means you own property or land in another country. Overseas assets are often managed under different laws and can affect your estate planning.

## What documents do you want to prepare

You can find out more about these documents on our website.

- Will** – allows you to legally appoint an executor and give instructions for what happens to your assets when you die.

### Who would you like to appoint as your executor?

- Public Trustee
- Another person

- 
- Enduring Power of Attorney** – allows you to legally appoint an attorney who can make financial and legal decisions for you while you are alive.

### Who would you like to appoint as your attorney?

- Public Trustee
- Another person

- 
- Enduring Guardianship** – allows you to legally appoint a guardian who can make medical and personal decisions for you while you are alive (if you can't make these decisions yourself due to incapacity).

*Please note you can only appoint an adult family member or friend as your guardian. You cannot appoint the Public Trustee to be your guardian.*

## Section 1 - Contact Information

### CLIENT DETAILS:

Title: (e.g. Mr/Mrs/Ms/Dr)

Surname:

Given names:

Also known as name:

(if applicable)

Preferred name:

Date of birth: (DD/MM/YYYY)

Occupation:

### RESIDENTIAL ADDRESS:

Street no. and name:

Suburb:

State and postcode:

Postal address:

As Above  Other

### CONTACT DETAILS:

Home phone:

Mobile phone:

Email:

### YOUR CONTACT PREFERENCES:

We may contact you about your documents or appointments. Your information is protected under the *Personal Information Protection Act 2004*.

After your appointment, we may send you one SMS to ask for quick feedback

Feedback SMS:  Opt out of providing us feedback

We may send occasional updates about seminars, events, or important news from the Public Trustee.

Updates & Events:  Opt out of important updates and event notifications

### RELATIONSHIP DETAILS:

**Single**

**Married**

Date of Marriage:

Place of Marriage:

Name of Spouse:

**Significant Relationship (de facto)**

Length of Relationship:

**Deed of registered relationship**

Length of Relationship:

**Divorced**

Date of Divorce:

Place of Divorce:

Name of Spouse:

**Separated**

**Widowed**

**If you have additional Marriages/Divorces, please state the details on the last page.**

**If you are in a current relationship, please complete the following**

Your partner's name:

Your partner's date of birth:

Your partner's address:

## Section 3 – Children

Do you have children?  Yes  No (If **no**, please go to the next section)

### Child 1

Child's full name:

Daughter/ Son:

Daughter  Son

Relationship:

Natural Child  Adopted Child  
 Step Child  Deceased Child

Date of birth: (DD/MM/YYYY)

Address:

Contact phone/email:

Is this child under a disability?

Yes  No  
If yes, state disability: \_\_\_\_\_

### Child 2

Child's full name:

Daughter/ Son:

Daughter  Son

Relationship:

Natural Child  Adopted Child  
 Step Child  Deceased Child

Date of birth: (DD/MM/YYYY)

Address:

Contact phone/email:

Is this child under a disability?

Yes  No  
If yes, state disability: \_\_\_\_\_

### Child 3

Child's full name:

Daughter/ Son:

Daughter  Son

Relationship:

Natural Child  Adopted Child  
 Step Child  Deceased Child

Date of birth: (DD/MM/YYYY)

Address:

Contact phone/email:

Is this child under a disability?

Yes  No  
If yes, state disability: \_\_\_\_\_

**If you have additional children, please state their details on the last page.**

## Section 4 – Household Goods and Personal Contents

Brief description of contents:

How are these assets owned?

solely owned    jointly owned

If jointly owned, please state with whom?

Estimated market value?

(\$)

**Please state any additional contents details on the last page**

## Section 5 – Motor Vehicles, Boats, Campervans etc.

Do you own a vehicle?

Yes    No

E.g. Car, boat, campervan etc.

(If **no**, please go to the next section)

Description of vehicle(s):

E.g. Subaru Forester 2017

How is the vehicle owned?

solely owned    jointly owned

If jointly owned, please state with whom?

Estimated market value?

(\$)

Do you have money owing against the vehicle?

Yes    No

Do you own any other types of vehicles?

Yes    No

(If **yes**, please state additional details on the last page)

## Section 6 - Property Details

Do you own real estate?  Yes  No (If **no**, please go to the next section)

Street no. And name:

Suburb:

State and Postcode:

How is the property held:

- Freehold (own property & land outright)  
 Leasehold (own property subject to terms)

Property type:

- Principal place of residence  
 Residential  
 Commercial  
 Vacant land

How is the property owned?

- Sole owner  
 Joint tenants  
 Tenants in common

If jointly owned please state with whom?

If tenants in common, please state Interest held?  %

Location of title deeds:

- At the property  
 With Public Trustee  
 Unknown  
 Other

If other, please state location:

Estimated value:

(\$)

Is there a mortgage over this property?

Yes  No

If yes, please state

Mortgage  
Financial  
institution:

Mortgage  
outstanding: (\$)

Do you own more real estate?  Yes  No

(If **yes**, please state the additional property details on the last page)

## Section 7 - Bank Accounts and Investments

Do you own a bank or investment account?

Yes  No (If **no**, please go to the next section)

### ACCOUNT 1

Financial institution:

How is the account owned?

solely owned  jointly owned

If jointly owned please state with whom?

Estimated value:

(\$)

### ACCOUNT 2

Financial institution:

How is the account owned?

solely owned  jointly owned

If jointly owned please state with whom?

Estimated value:

(\$)

Do you own any other accounts or investments?

Yes  No

(If **yes**, please state additional investment details on the last page)

## Section 8 - Shares

Do you own any Shares?

Yes  No (If **no**, for both clients please go to the next section)

Share company holdings (e.g. Woolworths, Telstra):

How are these shares owned?

solely owned  jointly owned

If jointly owned with whom?

Estimated value:

(\$)

Do you own any other Shares?

Yes  No

(If **yes**, please state additional share details on the last page)

## Section 9 – Liabilities

Do you have any Liabilities?  
E.g. Credit cards

Yes  No  
(If **no**, please go to the next section)

Provide details of liability:

How is the liability held?

solely held  jointly held

If jointly owned please state with whom?

Estimated value:

(\$)

Do you have any other liabilities?

Yes  No  
(If **yes**, please state additional details on the last page)

## Section 10 – Superannuation

Do you have superannuation?

Yes  No (If **no**, please go to the next section)

Fund name:

Account type:

Accumulation  Pension

Account balance:

(\$)

Do you have death benefit cover:

Yes  No  Unknown

If **yes**, please state death benefit cover:

\$

Nomination type:

Binding  
 Non-binding  
 No nomination  
 Unknown

Nominated to:

Estate  
 Named beneficiary (please state details below)

Name:

Relationship

to you:

Do you have any other superannuation accounts?

Yes  No  
(If **yes**, please state additional details on the last page)

## Section 11 – Funeral arrangements

Do you have any Funeral arrangements?

Yes  No

(If **no**, for both clients please go to the next section)

### CLIENT ONE:

Pre-paid funeral:

Yes  No

Pre-arranged funeral:

Yes  No

Funeral insurance:

Yes  No

Please state the details:

## Section 12– Life Insurance

Do you have Life Insurance?

Yes  No

(If **no**, please go to the next section)

Fund name:

Nomination In place:

Yes  No  Unknown

If **yes**, please state who it is nominated to:

Estate

Named beneficiary (please state details below)

Name:

Relationship to you:

Insurance cover:

(\$)

## Section 13 – Other Assets:

Do you own any Foreign Assets?

Yes  No

(If **Yes**, please state the details on the last page)

Do you have an interest in a business?

Yes  No

(If **Yes**, please state the details on the last page)

## What prompted you to make an appointment?

I am a previous client and knew I had to update my document

I did a web search

I had a promotional voucher

I received an email reminder

I went to a seminar — Which one \_\_\_\_\_

I am a beneficiary of estate

I saw a display ad on social media

a TV/radio ad

A friend recommended me

I picked up a brochure at Service Tasmania

Other \_\_\_\_\_

