

# ETU WILL INSTRUCTIONS



**Please post your completed Will Instructions  
to:**

**Hall Payne Lawyers**  
GPO Box 3114  
Brisbane Qld 4001



Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date:                    /                    /



# WILL INSTRUCTIONS ETU Union Members



**STEP ONE:** *Your Personal Information (please complete the following)*

<b>SURNAME:</b>	
<b>Given Names:</b>	
<b>Occupation:</b>	<b>Date of Birth:</b>
<b>Address:</b> (include Suburb / State / Pcode)	
<b>Phone:</b>	<b>Mobile:</b>
<b>Email:</b>	<i>I am happy to receive updates or newsletters by email</i> <input type="checkbox"/>
<b>Name of Union:</b>	<i>Electrical Trades Union (ETU)</i> <b>Membership No:</b>
<b>Cost:</b>	Because you are a financial member of your union, Hall Payne Lawyers will provide yourself and your spousal partner with a <i>Standard Will Free of Charge.</i>

**STEP TWO:** *Appointing your Executor(s) / Trustee(s)*

In the event of your death, your Executor(s) / Trustee(s) will pay your debts and ensure your Estate is handled in accordance with the your Will. An Executor / Trustee must be over 18 years of age. If necessary they are able to obtain specialist legal or financial advice to assist them with the administration of your Estate. The costs of this advice will be met from your Estate. You may appoint more than one person to this role. If you are appointing only one person, it is recommended that you also appoint an Alternative Executor / Trustee who will step in should your initial selection be unable or unwilling to act at the time of your death. We would normally recommend that you appoint your primary beneficiary to be the Executor / Trustee of your Estate unless you have specific reasons not to do so.

*Please complete the following to indicate your choice of Executor(s) / Trustee(s):*

<b>EXECUTOR / TRUSTEE</b> (person / persons appointed to act initially)	
<b>Name and Address:</b>	<b>1.</b>
<b>Name and Address:</b> (if applicable)	<b>2.</b>
<b>ALTERNATIVE EXECUTOR / TRUSTEE (if applicable)</b> (Act only should your initial Executor(s) / Trustee(s) all be unable or unwilling to act)	
<b>Name and Address:</b> (if applicable)	<b>1.</b>
<b>Name and Address:</b> (if applicable)	<b>2.</b>

*Funeral Instructions:* It is usually better to tell your Executor/Trustee or family members about your funeral instructions as a funeral is often held before the reading of a Will. You can however put your instructions in your Will:

<b>Funeral instructions:</b>	I would like to be: <i>Buried / Cremated / No specific instruction</i> Other specific instructions:
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Name: \_\_\_\_\_ Signature: \_\_\_\_\_  
Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_



**OPTION ONE.... Complete the following table IF you wish to leave your Estate to:**

- your spouse / life partner / de facto / other, (as initial beneficiary); then to
- your children; then to your children's children (*optional*); and then to
- another beneficiary/ies should none of the above survive you (*optional*)

<b>Full Name of Initial Beneficiary:</b>	
<b>Relationship to you:</b>	I refer to this person as my Husband / Wife / Partner / De facto / Other: _____
<b>Full Name(s) of your children:</b>	Should my Initial Beneficiary as listed above not survive me then my Estate will go to my child / children (if more than one in equal shares) whose full name(s) are/is as follows:  1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____
<b>Additional Queries and Information relating to your children and alternative beneficiaries:</b>	Is there a possibility you may have further children in the future? <span style="float: right;">Yes / No</span>
	Are any of your children minors (under the age of 18 years)? <span style="float: right;">Yes / No</span>
	If yes, do you wish to appoint a Guardian for any minor children? <span style="float: right;">Yes / No</span>
	<b>Full Name of Guardian:</b> _____
	<b>Relationship to you (eg. sister / cousin):</b> _____
	Do you wish your grandchildren to take their parents share of your Estate if their parent does not survive you? <span style="float: right;">Yes / No</span>
<b>Additional things to consider:</b>	Do you wish to nominate an Alternative Beneficiary / Beneficiaries should none of your children or your grandchildren survive you? <span style="float: right;">Yes / No</span>
	<b>If yes, please provide Full Name(s) of any Alternative Beneficiary(s) and their relationship to you who will inherit (if more than one in equal shares) under your Will in these circumstances:</b>
	1. <b>Full Name:</b> _____ <b>Relationship to you (eg. friend / cousin):</b> _____
	2. <b>Full Name:</b> _____ <b>Relationship to you (eg. friend / cousin):</b> _____
	3. <b>Full Name:</b> _____ <b>Relationship to you (eg. friend / cousin):</b> _____
	Marriage after the date of making your Will results in that Will being revoked and a new Will would need to be made. If you are currently not married but contemplating marriage or if you are in a de facto relationship, your Will should contain a "contemplation of marriage clause" to avoid potential future invalidity.  <b>Are you in a de facto relationship or contemplating marriage?</b> <span style="float: right;">Yes / No</span>

Name: \_\_\_\_\_ Signature: \_\_\_\_\_  
Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

**OPTION TWO.... Complete the following table IF you wish to leave your Estate to:**

- your children (as initial beneficiaries); and then to
- your children's children (*optional*); and then to
- another beneficiary/ies (*optional*) should none of the above survive you.

<b>Full Name(s) of your children:</b> <i>(initial beneficiaries)</i>	<p>My Estate is to go to my child / children (if more than one, in equal shares) whose full name(s) are/is as follows:</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>4. _____</p> <p>5. _____</p> <p>6. _____</p>
<b>Additional Queries and Information relating to your children and alternative beneficiaries:</b>	<p>Is there a possibility you may have further children in the future? <span style="float: right;">Yes / No</span></p> <p>Are any of your children minors (under the age of 18 years)? <span style="float: right;">Yes / No</span></p> <p>If yes, do you wish to appoint a Guardian for any minor children? <span style="float: right;">Yes / No</span></p> <p><b>Full Name of Guardian:</b> _____</p> <p><b>Relationship to you</b> (<i>eg. sister / cousin</i>): _____</p> <p>Do you wish your grandchildren to take their parents share of your Estate if their parent does not survive you? <span style="float: right;">Yes / No</span></p> <p>Do you wish to nominate an Alternative Beneficiary / Beneficiaries should none of your children or your grandchildren survive you? <span style="float: right;">Yes / No</span></p> <p><b>If yes, please provide Full Name(s) of any Alternative Beneficiary(s) and their relationship to you who will inherit under your Will (if more than one in equal shares) in these circumstances:</b></p> <p>1. <b>Full Name:</b> _____</p> <p style="padding-left: 20px;"><b>Relationship to you</b> (<i>eg. friend / cousin</i>): _____</p> <p>2. <b>Full Name:</b> _____</p> <p style="padding-left: 20px;"><b>Relationship to you</b> (<i>eg. friend / cousin</i>): _____</p> <p>3. <b>Full Name:</b> _____</p> <p style="padding-left: 20px;"><b>Relationship to you</b> (<i>eg. friend / cousin</i>): _____</p>
<b>Additional things to consider:</b>	<p>Marriage after the date of making your Will results in that Will being revoked and a new Will would need to be made. If you are contemplating marriage or in a de facto relationship your Will should contain a "contemplation of marriage clause" to avoid potential invalidity.</p> <p><b>Are you in a de facto relationship or contemplating marriage?</b> <span style="float: right;">Yes / No</span></p>

Name: \_\_\_\_\_

Signature: \_\_\_\_\_  
 Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_



**OPTION FOUR..... Complete the following table IF you wish to leave your Estate to:**

- an initial beneficiary; then to
- one or more alternative beneficiaries should this initial person not survive you

<b>Full Name of Initial Beneficiary:</b>	
<b>Relationship to you:</b>	(Eg. "my cousin", "my friend", "my husband", "my niece" )
<b>Full Name(s) of alternative beneficiary/ies:</b>	<p>Should my Initial Beneficiary as listed above not survive me then my Estate will go to the following (if more than one in equal shares):</p> <p><b>1. Full Name:</b> _____  <b>Relationship to you</b> (eg. friend / cousin): _____</p> <p><b>2. Full Name:</b> _____  <b>Relationship to you</b> (eg. friend / cousin): _____</p> <p><b>3. Full Name:</b> _____  <b>Relationship to you</b> (eg. friend / cousin): _____</p>
<b>Additional things to consider:</b>	<p>Marriage after the date of making your Will results in that Will being revoked and a new Will would need to be made. If you are currently not married but contemplating marriage or if you are in a de facto relationship, your Will should contain a "contemplation of marriage clause" to avoid potential future invalidity.</p> <p><b>Are you in a de facto relationship or contemplating marriage?</b>                      <i>Yes / No</i></p>

Name: \_\_\_\_\_ Signature: \_\_\_\_\_  
 Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_



## STEP FIVE:

*For your signature....*

**NOTE: THIS DOCUMENT IS NOT A WILL.  
YOUR WILL IS PREPARED FROM INFORMATION INCLUDED IN THIS DOCUMENT**

I \_\_\_\_\_, confirm that  
*[your full name]*

1. I give these instructions to prepare my Will with full legal capacity to do so.
2. I confirm that I do not have nor have had or experienced any recent medical illness or ailment (physical or mental) that has resulted in me not having legal capacity to give instructions for this, my Will. Further, I acknowledge that Hall Payne Lawyers will not be making enquiries of their own to establish my capacity to give these instructions.
3. I confirm my instructions to Hall Payne Lawyers are limited to the preparation of a Will in accordance with the information given in this Will Kit. The scope of my instructions does **not** allow for a complete review of my personal, business and / or financial circumstances.
4. I further confirm that the retainer between myself and Hall Payne Lawyers extends only to the preparation of the Will and does not extent to the proper execution (signing) of the Will. It is my responsibility to make arrangements for the proper execution of the Will and, if I chose, for the executed Will to be returned to Hall Payne Lawyers for safe keeping.
5. I acknowledge that I have understood the explanations provided in this document that relate to the issues governing executors, beneficiaries, nomination of guardians etc, what constitutes a standard and complex Will, and instruct Hall Payne Lawyers to draft my Will in accordance with my instructions herein provided.

\_\_\_\_\_  
*[Your signature]*

Dated:     /     /

Name: \_\_\_\_\_

Signature: \_\_\_\_\_  
Date:             /     /

## STEP SIX:

Can we assist you further?  
Signing and returning your Will Instructions

### A Will for your Spouse

As you are a financial union member with which we are directly affiliated, your spousal partner is entitled to **Standard Will free of charge also**. Generally, spousal partners design Wills that are complimentary in terms to one another.

Would you like us to produce a Will for your spousal partner also that compliments your own?

- No
- Yes. The full name of my spousal partner is \_\_\_\_\_  
My spousal partner's occupation is \_\_\_\_\_

### Enduring Powers of Attorney

**An Enduring Power of Attorney is an important legal document you prepare in order to give someone else the power to make personal or financial decisions on your behalf when circumstances exist which render you unable to make these decisions for yourself.**

You may not always be able to make decisions when you need to. You may be too ill to make choices about your medical treatment, or you could suffer a disability (such as a stroke) that prevents you telling others what decisions you want made. *Without an Enduring Power of Attorney, it is possible that those dearest to you may suffer unnecessarily from financial stress in the event that, without your consent to act on financial matters in particular, their hands are tied.*

For \$110 inclusive of GST Hall Payne Lawyers will produce this important document for you so as to safeguard yourself and those dearest to you in the event that you are incapacitated either permanently or temporarily.

If you would like to provide us with instructions to produce an Enduring Power of Attorney for yourself and possibly your spouse also, you should complete our "Enduring Power of Attorney Instructions". If you do not already have a copy of these instructions, or you have any queries regarding this service, please contact our office on 07 3221 2044 and speak to Amanda Fisher.

*Please now sign all pages of these instructions before returning them to our office at the address noted below.*

GPO Box 3114 Brisbane Qld 4001 general@hallpayne.com.au	<b>AREAS OF PRACTICE</b> Personal Injuries Employment & Industrial Law Family Law Wills / Estates Migration
	Phone: 07 3221 2044 Fax: 07 3229 9842

Name: \_\_\_\_\_ Signature: \_\_\_\_\_  
Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_