

INFORMATION PACK

On The Spot Will

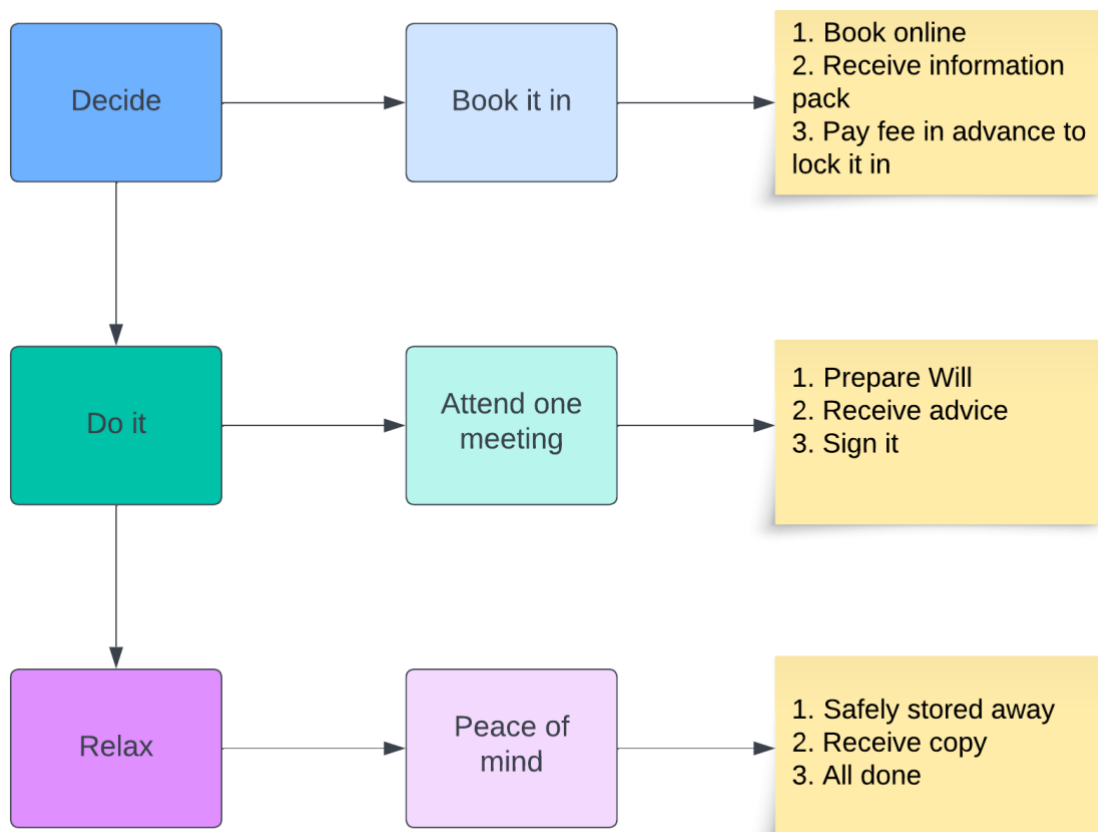
We know life gets busy and it can be hard to come to our office multiple times to sign what you may consider a simple document. This is why we have created an On The Spot Will option.

Below is an outline of how to get your On The Spot Will.

You are currently at the **Decide** stage. You have decided to get a will. This is the first step to getting it done and having peace of mind.

On the next pages, you will find important information about creating your will and things to think about before you attend at our office to get it done.

Action plan



You are here: Decide

“A goal without a plan is just a wish” – Antoine de Saint-Exupery

Book it in

Congratulations on taking the first step: *deciding* to create a will and taking the action of *booking it in*.

Our process is designed to ensure you get it done by creating and signing your new will in one easy session, so that you can relax and have peace of mind knowing your affairs are in order and wishes will be followed.

When we meet in person, it is easier and more efficient for us to get to know you, as well as the situation and requirements that are uniquely yours. You may also feel more open to letting us know your desired outcomes, and more comfortable to raise any concerns and questions.

If you need to reschedule your appointment, please click the *reschedule* link on the appointment confirmation email you will have received. Appointments can be rescheduled any time before the scheduled time.

This step, plus payment of our fee advance, secures your place in our workflow and ensures you get it done.

Receive information pack

This document and the other attachments in your booking confirmation email is your information pack and includes important information to:

- 1) Engage you as our client;
- 2) Tell you what to bring to our meeting; and
- 3) Gives you things to think about.

Engagement

Fee advance

Our engagement letter will have been attached to your booking confirmation email. This includes important information:

1. which we are required by law to provide you before doing any work; and
2. the fee advance we require to be paid before we meet with you.

Payment of our fee advance *locks you in* to our workflow and ensures your will gets done.

What to bring

Please bring the following things to our meeting:



Some form of photo ID. This is so we can identify you and ensure we are creating a will for the right person.



If you are elderly or your mental capacity is deteriorating: a letter from your GP doctor confirming you can make a will. This is crucial for helping prevent your will being challenged in the future.

Things to think about

To ensure your appointment with us is as quick and painless as possible, you may like to consider the following things in advance.

If you don't have time, that is ok! Just turn up to the meeting and we will do it all on the spot.

Executor

Who would you like to administer your estate? This is your executor/trustee. Please note this appointment doesn't give them special powers and no one will feel left out if you don't appoint them. This can be quite a laborious job often spanning over a year.

What is their full legal name as per their photo ID? Do they go by any other names?

What is their occupation and what town do they reside in?

If they are not available for this position, do you want to name a backup executor?

Your circumstances

Do you have a Contracting Out Agreement? If so, please bring it with you or send us a copy before your appointment.

Do you have a trust? If so, please bring a copy of your trust deed with you or send us a copy before your appointment.

If you have a family trust you may be able to:

Appoint a replacement trustee;

Appoint a replacement appointor;

Forgive any debt owed to you by your trustees;

Record guidance for your trustees to tell them what you want to happen with the trust assets when you pass away.

Your belongings – your net worth \$_____

It is important to consider all your assets and liabilities when making your will.

Your assets – approx. value \$_____

House / land / occupation rights

Bank accounts

Investments – shares, Kiwisaver, superannuation

Personal loans

Life insurance, funeral insurance, mortgage protection insurance

Your liabilities – approx. value \$_____

Mortgage

Personal loans

Creditcard / GEM visa / hire purchases

Outstanding invoices around town

Who do you want to inherit your belongings?

Specific gifts

Cash sums e.g. to grandchildren and/or your executor for their efforts in administering your estate.

Jewellery and other family heirlooms.

Household items and vehicles.

Firearms must be left to someone with a firearms licence.

Gifts to charities.

Specific properties to a specific people.

Everything else

Usually everything else is lumped together as your “residuary estate” and given to your executor to pay your bills, funeral expenses, and then whatever is left over can go to the person/people of your choosing.

Common examples:

- Everything to your spouse if they survive you or, if they don't, everything to your children equally. In the event a child dies before you, you may like their share to go to their children.
- Your estate is to be split into unequal shares and given to relatives – 1/3 share to your niece and 2/3 share to your granddaughter.

- If you have children with a former spouse, you may like to give a life interest to your current spouse so they can continue to live in your residence and then have it go to your children once they die.
- Leave personal household items to a specific person and leave everything else to your family trust.

Other

Testamentary guardian

If you have infant children, you can appoint a testamentary guardian to make important decisions about their life. This appointment will give them grounds to apply for custody in the event both parents have passed away.

Funeral directions

Your executor is ultimately responsible disposing of your body. However, you can make any wishes relating to your funeral and burial or cremation known to them in your will.

Excluding a child

The law says you have a moral duty to provide for your children. However, there are times when people want to exclude a child from their will due to a breakdown in relationship or due to an undesirable habit they want to skip a generation.

It is recommended that, in this situation, you consider leaving 5-15% of your estate to that child and/or record reasons for leaving them out of your will. This will assist if they make a claim against your estate.

Thank you for taking the time to review these questions. If there is anything you are unsure about or would like to discuss, please bring a list to our meeting.

You are here: Do it

You will attend *one meeting* to:



Prepare your will: we will take your instructions and draft your Will in one easy session. No need to go away and wait for us to draft your Will before coming back in to sign it. No need for 5,000 more emails to schedule another suitable time to come in.



Receive legal advice: we will advise you on your Will *on the spot*.



Sign it: you Will sign your will during the same meeting... before you leave the building / get hit by a bus.

You are here: Relax

Our simple solution to completing your new will *on the spot* will give you peace of mind, so you can relax, knowing your affairs are in order.

Your Will will be:



Safely filed away in our deeds storage. It will also be scanned into our electronic system and backed-up in case anything was to happen to the original / if we burn to the ground.



Provided to you as a copy – either by email or hard copy. You can keep this with your records and/or provide a copy to your executor so they know where the original is kept and what their role will entail.



All done: in one easy session.

If you have any queries after your appointment, feel you have rushed into it and/or wish to change or revoke your Will, please do not hesitate to contact us.

Kind regards,

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