

Will Planner

You can use this planner to help you prepare for some of the questions you are likely to be asked when you see a solicitor to make your Will.

We suggest you complete it as fully as you can and take it with you to your appointment.

1 This section will help you calculate the approximate value of your estate

What do you own? <i>This might include</i>	Value
Residential property	\$
Other property or land	\$
Home contents (furniture, etc.)	\$
Vehicles (cars, etc.)	\$
Items of value (e.g. jewellery or artwork)	\$
Bank account(s)	\$
Insurance & superannuation	\$
Shares/investments	\$
Other assets	\$
Total A	\$

What do you owe? <i>This might include</i>	Amount
Outstanding mortgage	\$
Loans & overdrafts	\$
Credit card balance	\$
Other money owed	\$
Total B	\$

Estate value <i>Subtract Total B from Total A to calculate your estate's total value</i>	Value
Total A	\$
Less Total B	\$
Estate Value	\$

2 Who will benefit?

Having considered the approximate value of your estate (which will of course change over time), you can now think about the people and causes you would like to benefit from your Will and how.

Name	Address	% Share
		\$ Amount
		Specific item(s)
Name	Address	% Share
		\$ Amount
		Specific item(s)
Name	Address	% Share
		\$ Amount
		Specific item(s)
Name	Address	% Share
		\$ Amount
		Specific item(s)
Name	Address	% Share
		\$ Amount
		Specific item(s)
Name	Address	% Share
		\$ Amount
		Specific item(s)
Name Cancer Council Victoria (ABN 61 426 486 715)	Address 615 St Kilda Road Melbourne VIC 3004	

How would you like Cancer Council Victoria to benefit? Remember this can be a percentage of your entire estate; all or part of what remains (the 'residue') after making provision for family and loved ones; a specific sum of money; and/or item(s) of value such as real estate or shares.

3 Who will administer your estate?

Most people choose a solicitor as their executor and/or a close family member or friend.