

We know that filling in forms is time-consuming and painful, but we need all of the information in this questionnaire. If we do not get the full details, it only means that we will annoy you later by asking you for it.

1. GENERAL DETAILS	
1.1 Details of the Deceased: (a) Full names of the Deceased and any other names used. (b) Last permanent address. (c) Occupation. (e) Date of death. (f) Place of death (f) Age of the Deceased at death.	
1.2 (a) Country of domicile. (b) If there are separate jurisdictions within the country (e.g. Australia, Canada) please state the particular State or Province.	
1A. DETAILS OF WILL ETC	
1A.1 Date of Will:	
2. PERSONAL REPRESENTATIVES As regards each Executor/Administrator, please state: <u>Executor/Administrator 1</u>	
2.1 Full names: 2.2 Address: 2.3 Current age	
<u>Executor Administrator 2</u>	
2.1 Full names: 2.2 Address: 2.3 Current age	
<u>Executor Administrator 3</u>	
2.1 Full names: 2.2 Address: 2.3 Current age	
<u>Executor Administrator 4</u>	
2.1 Full names: 2.2 Address: 2.3 Current age	
Are there any executors named in the Will who have not been granted Probate (e.g. power is reserved)? If Yes, please name them. If Yes, have they taken any steps to apply for Probate?	

<p>3. <u>BENEFICIARIES</u></p> <p>As regards each beneficiary, please state:</p> <p><u>Beneficiary 1</u></p> <p>3.1 Full names:</p> <p>3.2 Current age</p> <p>3.3 Relationship to the deceased:</p> <p>3.4 Share or percentage of the estate</p>	
<p><u>Beneficiary 2</u></p> <p>3.1 Full names:</p> <p>3.2 Current age</p> <p>3.3 Relationship to the deceased:</p> <p>3.4 Share or percentage of the estate</p>	
<p><u>Beneficiary 3</u></p> <p>3.1 Full names:</p> <p>2.2 Current age</p> <p>3.3 Relationship to the deceased:</p> <p>3.4 Share or percentage of the estate</p>	
<p><u>Beneficiary 4</u></p> <p>3.1 Full names:</p> <p>3.2 Current age</p> <p>3.3 Relationship to the deceased:</p> <p>3.4 Share or percentage of the estate</p>	
<p><u>Beneficiary 5</u></p> <p>3.1 Full names:</p> <p>3.2 Current age</p> <p>3.3 Relationship to the deceased:</p> <p>3.4 Share or percentage of the estate</p>	
<p>4. <u>JOINT ASSETS IN AUSTRALIA</u></p> <p>Did the Deceased hold any assets in Australia in joint names with another person? If so:</p> <p>4.1 Please list all joint assets, showing date of death values. These may include bank and building society accounts, stocks and shares and land and buildings.</p> <p>4.2 Who are the other joint owner(s)?</p> <p>4.3 Do the joint items pass to the other joint owners by survivorship?</p>	

<p>5. <u>STOCKS AND SHARES IN AUSTRALIA</u></p> <p>5.1 Please supply details of all stocks, shares, unit trusts and other securities owned by the Deceased and provide a date of death valuation.</p> <p>5.2 In the case of <u>private company shares</u>, please confirm the basis of valuation.</p>	
<p>6. <u>BANK ACCOUNTS ETC</u></p> <p>6.1 Please list all bank, building society or credit union accounts, showing account numbers and date of death values. Please also provide address details for each asset holder.</p>	
<p>7. <u>LIFE ASSURANCE IN AUSTRALIA</u></p> <p>Did the Deceased pay any premiums on any life insurance policies payable to the Australian estate? If so: Please provide details in each case.</p>	
<p>8. <u>ASSETS HELD IN AN AUSTRALIAN TRUST</u></p> <p>Did the Deceased have a right to benefit from assets held in an Australia-based trust at the date of death? If so:</p> <p>8.1 Who are the trustees?</p> <p>8.2 Please supply the name, address and reference of the agents acting for the trustees.</p>	
<p>9. <u>PENSIONS IN AUSTRALIA (Non-government)</u></p> <p>Did the Deceased have an Australian pension (e.g. from a former employer) apart from Centrelink (government pension)? If so:</p> <p>9.1 Please give details of the name, address and reference of the pension provider.</p> <p>9.2 Please give details of any lump sum payable by a pension provider as a result of the Deceased's death and confirm whether it is payable to the estate or to other persons.</p>	
<p>10. <u>BUSINESS INTERESTS IN AUSTRALIA</u></p> <p>Did the Deceased own all or part of a business or was the Deceased a partner in a business? If so:</p> <p>10.1 Please give details of the type of business interest concerned.</p> <p>10.2 Please provide a date of death value for the business interest and confirm the basis of that valuation.</p>	
<p>11. <u>DEBTS DUE TO AUSTRALIAN ESTATE</u></p> <p>Did the Deceased lend any money, either on mortgage or by personal loan that was repayable in Australia and had not been repaid by the date of death? If so:</p> <p>11.1 Please give full details of each loan.</p> <p>11.2 What was the amount of principal and interest outstanding at the date of death?</p>	

<p>12. <u>INTEREST IN ANOTHER AUSTRALIAN ESTATE</u></p> <p>Did the Deceased have a right to a legacy from, or a share of, an Australian estate of someone who had died, but which had not been paid in full before death? If so:</p> <p>12.1 Please state name of the person who died and date of death.</p> <p>12.2 Please state the name, address and reference of the agents dealing with the estate.</p> <p>12.3 Please confirm the amount of the unpaid legacy or share.</p>	
<p>13. <u>LAND AND BUILDINGS IN AUSTRALIA</u></p> <p>Did the Deceased own land or buildings in Australia? If so:</p> <p>13.1 Please give details of all properties held, stating whether freehold or leasehold.</p> <p>13.2 Please provide a valuation of each property at date of death.</p> <p>13.3 Were any of the properties subject to mortgage at the date of death? If so, please confirm the name and address of the person or institution to whom the property was mortgaged and the amount of principal and interest outstanding at death.</p>	
<p>14. <u>DEBTS OWED BY THE ESTATE IN AUSTRALIA</u></p> <p>Is there any money that the Deceased had borrowed from relatives, close friends, or trustees, or other loans, overdrafts or guarantee debts? If so:</p> <p>14.1 Please give details of any debts due to close friends or relatives from the Australian estate.</p> <p>14.2 Please give details of any other loans or overdrafts repayable from the Australian estate.</p>	
<p>15. <u>ADDITIONAL INFORMATION ABOUT ASSETS IN AUSTRALIA</u></p> <p>Please give full details of all other Australian assets and supply date of death valuations or balances:</p>	
<p>15. <u>DEBTS AND LIABILITIES IN AUSTRALIA AT THE DATE OF DEATH</u></p> <p>Liabilities and debts in Australia:</p> <p>Please list any liabilities or debts due from the Deceased's Australian estate at death.</p>	
<p>16. <u>MISCELLANEOUS</u></p> <p>Any other points: Please mention any other information about assets, liabilities or otherwise which you consider to be relevant</p>	
<p><u>In order to reseal a Grant of Probate in New South Wales, we need (in addition to this completed questionnaire):</u></p>	<ul style="list-style-type: none"> • A "sealed & certified engrossment of the foreign grant" of probate. The Court will not accept a certified copy. We need the original grant of probate or a certified engrossment (i.e. a copy certified & engrossed by the Court). The foreign grant must include a copy of the Will certified by the issuing Court • A power of attorney appointing Stuart Niven the attorney of the Executor for the purposes of resealing the Grant of Probate. We will send you a draft Power of Attorney once we receive this form.
	<p>SIGNED: _____</p> <p>DATED: _____</p>