



KLINKERT LAW

29 Hope Street, Dunedin;  
P O Box 767, Dunedin 9054  
P 03 477 7267 F 03 477 2053  
E [anja@klinkertlaw.co.nz](mailto:anja@klinkertlaw.co.nz)

## WILL QUESTIONNAIRE

1. Your **full name, occupation and address**.

---

---

---

---

---

2. Are you known by any other name?

---

3. The **full name, occupation and address** of your spouse or partner — if a partner, show whether civil union or de facto partner.

---

---

---

---

---

4. Are you living together or are you separated?

---

---

5. **Full names, occupation and address** and dates of birth of your children, with name of the other parent if not your present spouse/partner?

---

---

---

---

---

6. List your present assets and liabilities with approximate values of each, spelling out which are your separate property and which are relationship property (*It is not possible in a space-constrained form like this to give more than a rule-of-thumb idea of what assets are separate or relationship property. Very simply put, separate property covers assets brought into the relationship and not used for the benefit of both parties to it, as well as assets received from a person, an*



11. Do you wish to make any gifts of money or assets in your will? If so, please give the full names and relationship, the addresses and occupations, of the recipients and details of what you wish to leave them. If the gift is to your spouse or partner is it to take effect whether they accept what you give them under your will or bring a claim under the Property (Relationships) Act 1976?

---

---

---

---

---

---

---

---

12. Do you wish to give any person a life interest in your estate or any asset(s) of it (i.e. give to that person the use of those during his/her lifetime; with the capital later going to some other person or persons)? If so, give full name and relationship, the address and occupation, of the person or persons. Give a breakdown of the part(s) of your estate that are to be left on a life interest. There can be estate protection planning advantages in giving a life interest to your spouse or partner rather than an outright gift, although this may give them the ability to successfully bring a claim as outlined in 11 above.

---

---

---

---

---

---

---

---

13. Who is to receive the residue (i.e. the rest of your estate after the debts and legacies have been paid and provision made for any specific gifts and/or life interest)? Name and relationship, the address and occupation of the beneficiary/beneficiaries.

---

---

---

---

---

---

---

---

14. If any beneficiary dies before you, what would you like to happen to his/her share? Name and relationship, the address and occupation, of substitute beneficiaries required.

---

---

---

---

---

---

---

---

15. Do you have the power of appointment of beneficiaries given to you under any trust deed or will or power to appoint trustees of a trust or directors of a company which you can exercise in your will?

---

---

---

16. Do you want your Trustees to have the power to carry on any business you have, manage a company which owns a business you have an interest in, or want to make any special provisions for the business or company?

---

---

---

17. If you are giving any of your close family no benefit under your will, or less benefit than other members of that part of the family, tell us your reasons, as a close family member in that position may be able to apply to the Court for a share or a greater share of the estate.

---

---

---

---

---

18. Have you made any promise, whether enforceable or not, to leave property to somebody by will? In some circumstances, those promises can be enforced against your estate if you do not fulfil them.

---

---

---

19. Is there anything else you want to include in your will?

---

---

---

Please return the completed form to us at Klinkert Law, PO Box 767, Dunedin 9054 or e-mail to [anja@klinkertlaw.co.nz](mailto:anja@klinkertlaw.co.nz).

Anja will draft your will and once approved you can arrange a time to meet with Anja and sign your will. The cost involved is \$350.00 plus GST and disbursements per will or two for \$600.00 plus GST and disbursements (it includes providing further certified copies in the future when requested and safe storage of the original will).