

Data Collection Form

Client (Testator)

First names				
Last name		Occupation		DOB
Marital status	<input type="checkbox"/> Single	<input type="checkbox"/> Married	<input type="checkbox"/> Defacto	<input type="checkbox"/> Partner
City		Email		
Funeral directions	<input type="checkbox"/> Buried	<input type="checkbox"/> Cremated		

Partner (if any)

Partner type	<input type="checkbox"/> Husband	<input type="checkbox"/> Wife	<input type="checkbox"/> Partner Female	<input type="checkbox"/> Partner Male
First names				
Last name		Occupation		DOB
Executor of Will	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Funeral directions	<input type="checkbox"/> Buried <input type="checkbox"/> Cremated
Email				

Child 1 (if any)

First names	
Last name	Age

Child 2

First names	
Last name	Age

Child 3

First names	
Last name	Age

Child 4 (if more use a separate page)

First names	
Last name	Age

If Single Will

Executor - or,

If Partner Will

Backup Executor (where needed)

Relationship. Aunt, Brother, Sister etc	
First names	Last name
City	Occupation

Will details

Beneficiaries if Single Will and no children

Equal Share <input type="checkbox"/> Yes <input type="checkbox"/> No	Or percentage each %
Relationship. Aunt, Brother, Sister etc	Relationship. Aunt, Brother, Sister etc
First names	First names
Last name	Last name
Occupation	Occupation
Relationship. Aunt, Brother, Sister etc	Relationship. Aunt, Brother, Sister etc
First names	First names
Last name	Last name
Occupation	Occupation

Guardian if children are under 16

Relationship. Aunt, Brother, Sister etc	
First names	
Last name	Occupation
Executor of Will <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	City

Personal \$ Gifts if any

Organisation name	Amount \$	
Organisation name	Amount \$	
Relationship. Aunt, Brother, Sister etc		
First names		
Last name	Occupation	Amount \$

Adviser please read and confirm

The client (Testator) has given me these instructions to enter their Will information into www.simplewills.co.nz. They acknowledge there was no advice given in the preparation of their Will.

Yes No