

## Information checklist

### **AFTER will and/or enduring power of attorney are signed**

*This document tells you important formation about your will and enduring power of attorney. You will be given the original of this form.*

### **Will**

- You have been given the original of your will.
- We will not hold the original, but we will keep a copy.
- You should tell your executors where your will is, so they can locate it easily.
- Please note that if you keep your will at home and it cannot be located, unless it can be proved otherwise, it will generally be presumed that you destroyed your will.
- Do not hole punch, insert any staples, or attach paperclips on the original will.
- It is also advisable not to make any marks or notations on the original will or copies as these instructions may unintentionally cancel the will or raise doubts about your intentions.
- Also, if you make any extra notes about your wishes those notes can form part of your will, which might not be your intention.
- You should review your will if any changes happen, for example if your executor can't be your executor anymore as they have died, have lost capacity or become bankrupt.
- You should also review your will if you separate, divorce from your partner/spouse, or one of your beneficiaries passes away, loses capacity or becomes bankrupt.
- You should also relook at your will if you have given a gift away, but then you do something different with it, as that may mean the person who was to get the gift can contest your will.

### **Enduring power of attorney**

- You have been given the original of your enduring power of attorney.
- We will not hold the original, but we will keep a copy.
- Your enduring power of attorney is not valid until your attorneys sign it.

Signed

Client name: \_\_\_\_\_ Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Witness name: \_\_\_\_\_ Witness Signature: \_\_\_\_\_ Date: \_\_\_\_\_