

# Important Information about your Will Appointment



Public Trustee

## Before Your Appointment

- Read the enclosed leaflets** that provide information about the Public Trustee's Will and Enduring Power of Attorney preparation and Deceased Estate Administration service to determine if our services are appropriate for you.
- Ensure that you understand that **we charge fees for our services**. Please see the enclosed leaflet entitled "Wills and Enduring Power of Attorney" for an indication of how much we will charge for preparing Wills and Enduring Powers of Attorney. If you are appointing the Public Trustee as your executor, please see the enclosed "Deceased Estate Administration" leaflet for an indication of our fees, which will be deducted from your estate after you pass away. In certain circumstances, other additional charges may also apply. Please see the Public Trustee Scale of Fees document which is available on our website. Fees are subject to change, without notice.
- Think** about who you would like to name in your Will as your:
  - Executor (The Public Trustee or person who will administer your estate after you die).
  - Beneficiaries (including any charities).
  - Guardians for minor children.
- If you have made a "couple appointment", confirm whether you and your partner need a couple appointment or two single appointments?**

A "couple appointment" is only suitable for cohabiting, married and de facto couples. If your individual circumstances or intended Wills are not sufficiently similar, we may need to consult with you separately, and single consultation fees may apply. Please contact us immediately if you realise you need to change to two single appointments.
- Please let us know if you have any disabilities or special needs that need to be considered when making your Will.
- If you need an interpreter, please let us know in advance and we will arrange an **independent interpreter**. If you are a couple and need an interpreter, you and your spouse or de facto partner are usually seen separately.
- Please **DO NOT** send in a draft Will or written instructions for making or changing your Will as these writings may be considered an 'informal Will' and may complicate the administration of your estate if you do not proceed or if you pass away prior to your appointment. Your instructions will be discussed and documented at the interview.
- MOST IMPORTANTLY: Please complete and return the Will Application Form** (including copies of requested documents) to the Public Trustee. Ensure you provide full names and details of any people you may wish to benefit from your estate including middle names, their date of birth and their relationship to you. Please contact us if you require assistance completing it.
- Once you have returned the Will Application Form, we will endeavour to have one of our Legal Officers review it within three business days. If there is an issue, a Legal Officer will call you to discuss the matter. Once reviewed, one of our Client Service Officers will call you to book an appointment.

## About Your Appointment

### What do I need to provide?

#### Two forms of identification, including:

1. Current photographic identification that includes your full name and date of birth (E.g. Passport, Driver's Licence or Proof of Age Card).
2. Pensioner Concession Card, Health Care Card, Commonwealth Seniors Health Card or DVA Health Card (Gold, White or Orange). You will only be eligible for the concession holder fee if you present your card at your appointment. The WA Seniors Card is not accepted.

- Payment** is required on the day of your appointment. We accept cheque, Visa or Mastercard (and cash and Eftpos at our Perth office). We **do not** accept American Express or other credit cards.

### How long will the appointment take?

A Will appointment for a single person can last up to 1½ hours, and up to 2 hours for a couple. Please allow sufficient time if parking in the city.

### Who can come along?

Family members, friends and carers are **not** permitted at the appointment while you are giving us instructions for your Will. To help both you and our professionals concentrate, and as a courtesy to other clients, we ask that you **do not bring children** to your Will appointment. Children often find discussions about death distressing and may struggle to sit quietly for up to 2 hours in our small interview rooms.

### Can someone else give instructions on my behalf?

We are unable to discuss instructions about your Will or your personal details with anyone other than you. If you are attending as a couple, **both** of you must be present for the entire appointment.

### What if I already have a Will with the Public Trustee?

The Public Trustee will have a copy of your previous Will. However, we now prepare Wills using a customised computer program. This means that your new Will may look and be worded differently to past Wills prepared by the Public Trustee. Regardless of whether you want to make major or minor changes, we need to obtain comprehensive details during your interview to ensure that we have all the necessary, up-to-date information as evidence to support your Will. Remember, please do not send us your written changes to gifts or instructions. These will be discussed at the interview.

### How soon will my Will be ready?

For in office appointments, most Wills are ready at the end of your initial interview. Our staff can witness your Will and ensure it is correctly executed before you leave. Some Wills may take additional time to prepare. Our staff will assist you in making an additional appointment. If an appointment is conducted over the phone, we will post your Will to you for execution.

**PLEASE NOTE:** Inability to comply with these requirements may result in us not being able to proceed with your appointment and/or may result in additional fees and charges being incurred by you. The above processes are also subject to change if restrictions are imposed as a result of public health advice. **If you have any questions about your Will appointment or need to reschedule or cancel, please contact Public Trustee Client Services on 1300 746 116 or email [PTOWillsAppointments@justice.wa.gov.au](mailto:PTOWillsAppointments@justice.wa.gov.au) as soon as possible.**