**Max and Samantha Smith**

INTERVIEW AND DATA CAPTURE

Enduring Power of Attorney and Will

The following enduring power of attorney and Will interview captures details around who will be looking after your affairs in the event of your incapacity or demise. It also goes into whether you want to leave any specific gifts to anyone and finally who and what percentage of the estate you would like to leave your primary beneficiary. Also, for completeness if they are not alive what is to happen to their share and so on. If you have any questions, please do not hesitate to contact us.

1. **Who is to be your Enduring Power of Attorney and Executor?**
2. Who is to be your Enduring Power of Attorney (EPOA) and Executor? Put their name and address in the box below. This may be held jointly by one or more persons. If you want different persons for the roles write in the box below the name of those persons but for simplicity and safety, it is best to have one person or persons being your power of attorney and executor.

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| Each other |

1. If none of your EPOAS or Executors can fulfill their duties because of sickness, incapacity or death who is to be your second in line EPOA and Executor? This may be held jointly by one or more persons. If you do not want a second line of EPOAs or Executors just put “NA”

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| For Samantha it will be her sister Francine Brown and for me it is my father John Smith |

1. If none of your first or second line EPOAS or Executors can fulfill their duties because of sickness, incapacity or death who is to be your third line of EPOA and Executor? This may be held jointly by one or more persons. If you do not want a third line of EPOAs or Executors just put “NA”

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| NA |

1. **Enduring Powers of Attorney**

Your EPOA will look after you personal, financial and if you have a SMSF, can act as a trustee of the Fund. You can give them unfettered control or provide limits – such as “ensure that any health care is of the highest standard” just to provide them with some guidance. If you would like to put in some guidance including what not to do then insert in the box below:

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| Make sure my health and wealth is looked after for my family and ensure we receive advice from our accountant Nathan Blunt from Blunts Accountants in Dee Why |

1. **WILLS – SPECIFIC GIFTS BEFORE THE REST OF THE ESTATE**

After appointing a chain of Executors to manage your estate the next step is to guide your Executor with your desire to make a specific gift to a spouse, child, grandchild, or other person. Once this is done and the gifts are made, anything left over forms the remaining estate which may be passed in its entirety to a spouse or children individually or to be shared. Importantly specific gifts rank higher in importance than the remaining estate so spend time on specifics.

The first step then is to look at specific gifts. Now do you want to make any specific gifts to any person – such as “My investment property at 5 Smith Street Collingwood Vic is to go equally to my eldest daughter Jane” or “My sister Jonie Smith is to receive $100,000” or “All my estate is to go to my wife Janelle” or “My Executor is to distribute my personal effects and jewelry in a fair and reasonable manner.”

*Feel free to make as many bequests as you want – the more specific gifts you complete it makes the role of the Executor that much easier and faster.*

**Specific Gifts** – this provides your Executor with the authority to transfer property, shares, jewelry, cash, or a percentage of all your assets, after any specific bequests to a certain person or group of persons. Please be as specific as possible and identity the assets and persons which may include a charity and does not have to be only persons or charities resident in Australia. If the person receiving the gift is not alive then the asset forms part of the remaining estate.

Please note that this is the area to gift digital assets such as social media, databases or crypto currencies such as Bitcoin:

1. **Specific Gift No 1**

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| NA |

1. **Specific Gift No 2**

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| NA |

1. **Specific Gift No 3**

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| NA |

1. **Digital Assets and Crypto-currencies such as Bitcoin**

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| I have three bitcoin at BTC markets:  |

1. **WILLS AND THE REMAINING ESTATE**

If there are any assets or monies left over after paying all expenses of the estate and also paying out all specific gifts the remainder of the estate, called the residual estate is to pass to the main beneficiaries is they are alive

1. **Main Beneficiary:** Who are the main beneficiaries and if more than one are they to take equally or note down any specific percentages for any beneficiary or beneficiaries?

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| Each other and 100% of the estate and superannuation  |

1. If the main beneficiary or beneficiaries are not alive then who is to get their benefits – choose from one of the following:
* Their bloodline children which may be held on trust subject to the Executor’s discretion and on the advice of the adviser of the Estate
* Any surviving Main Beneficiary in equal proportions
* To be paid to the Secondary Beneficiary
* To be paid to any Bloodline Beneficiary at the Executor’s discretion
1. **Secondary Beneficiary:** If the main beneficiary has passed the estate (in the event of their death) to a secondary beneficiary or beneficiaries are they to take equally or note down any specific percentages for any beneficiary or beneficiaries?

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| NA |

1. If the secondary beneficiary or beneficiaries are not alive then who is to get their benefits – choose from one of the following:
* Their bloodline children which may be held on trust subject to the Executor’s discretion and on the advice of the adviser of the Estate
* Any surviving Secondary Beneficiary in equal proportions
* To be paid to any Bloodline Beneficiary at the Executor’s discretion
1. **Funeral Wishes**

What are your funeral wishes?

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| Both be buried at Rookwood Cemetery at my grandparents funeral plot |

1. **Child and Pet Guardianship**

If you have children or pets who is to be their guardian? Please identify specifically with name and address of the guardian and any financial provision to be made to them to act as guardian.

**Child Guardianship**

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| The girls are to be looked after by Sam’s sister Francine. She and my brother Chris are to be the joint trustees of the trust established for the girls and any monies are to be used to provide the best possible school care and they can receive income from age 18 and capital from age 25. |

**Pet Guardianship**

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| Tinkles the cat will go to Francine |

**This is the end of the interview**