Get ready for your Will

Think it through here first. Then your Foundation Will takes minutes.

willzee

1 About you

Have handy

- ☐ Full legal name, middle names included
- ☐ Any other names you're known by
- ☐ Date of birth and occupation
- ☐ Any earlier Will, and who holds it
- ☐ Home address, with postcode
- ☐ Email and mobile
- ☐ Relationship status

2 Your people

Decide before you start

Your executor The person who carries out your Will. Most people name one.	
Executor's full legal name	Relationship to you
Backup executor, in case they can't act	Relationship to you

Children under 18 Name their guardian, in addition to any other guardian.	
Guardian's full legal name	Relationship to you
Backup guardian, optional	Relationship to you

Your beneficiaries People or charities. Share equally, or by percentage.

Full legal name	Relationship to you	Share
		%
		%
		%
		%

If any beneficiary dies before you Their share goes to one of these.

- ☐ **Their children** — Who survive you, equally. If none, their grandchildren.
- ☐ **The remaining beneficiaries** — Divided among the others in proportion to their shares.
- ☐ **Someone else** — Write the people or charities here.

Use full legal names. Name each person, not a group like "my children".

3 Your estate

Decide before you start

Your estate at a glance Rough figures are fine. They never appear in your Will.

Everything you and your partner own, less mortgages and debts	Of that, how much is in your name only?
The home (even if jointly owned), savings, KiwiSaver, vehicles, investments.	Part of the total, not extra. Your KiwiSaver, sole bank accounts, anything held in your name alone.
$	$

Anything else? Most people skip all three. Tick only what applies.

☐ A specific gift	☐ Someone to leave out	☐ A special wish
A sum of money or an item, to a person or a charity.	A person who might expect a share and won't receive one.	A short instruction for your executor.

Trusts, gifts with conditions and rights to live in a house need Willzee Smart Start, which adds a lawyer's review.

Estate administration Who should help your executor with the paperwork? Nothing to pay now.

☐ Willzee partnered	☐ Another provider
One fee, paid from your estate. Our legal partners' fees are included, with no markup.	A law firm or trustee company you name. A release fee applies, plus their own charges.

Your executor stays in charge either way. The app shows what each option would cost before you choose.

4 Your Will

Sign it, then share it

Print and sign With two witnesses, all three of you present at the same time.

First witness	Second witness

Neither witness can be a beneficiary, or the partner of one. Then tell us it's signed, and where it's kept.

Share and verify Each person acknowledges your wishes, adding to the record that they are yours.

Who to share with	Their email	Full	Partial	Private
		☐	☐	☐
		☐	☐	☐
		☐	☐	☐

Full: your Will as written. **Partial:** who is included, without values or shares. **Private:** that your Will exists, nothing more. Anyone you have left out is never mentioned.

Ready? Start at app.willzee.com

No cost in your lifetime. Most people finish in about ten minutes.