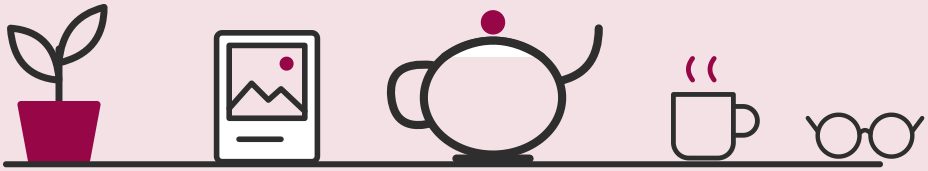
Over to you.

The things I'd tell you if I were still here to ask.



This book belongs to

willzee

If you've found this, I've probably gone.

Sorry about that.



First, put the kettle on. Nothing in this book needs doing in the next ten minutes.

Start here: contact Willzee

If my Will is with Willzee, they hold the record of it, who my executor is, and how I asked for my estate to be handled. Get in touch and they'll take it from there. If it isn't, the next page says who to ask.

app.willzee.com

Choose "Reporting a death?"

My name .....

My Willzee reference, if I have one .....

No phone number here on purpose. Willzee's email is hello@willzee.com, and the app is the quickest way to reach them.

Three things to know about this book



My Will is the boss.
This book is guidance for my executor. If the two ever disagree, my Will wins.



It's a map, not a safe.
It says where things are. It never holds passwords, PINs or account numbers.



It may be out of date.
Check the date on each page, and ask Willzee for my latest wishes.

The people in charge

As named in my Will. Executor: the next four pages are for you.

My executor is .....

Phone .....

Backup executor .....

Phone .....

The signed original of my Will is kept .....

Dates matter. If this book and my Will carry different names, the Will is the later word, and Willzee has the current version.

If you're my executor.



Breathe. You're allowed to be slow.

You've been handed a job nobody trains for. The next four pages are the whole of it, in the order it happens. Most of it can wait, and none of it has to be done alone.

The first week

Nothing legal happens yet.

Get the death certificate.

The funeral director usually arranges it. You'll need several copies, so ask for them.

Tell the people on page 12.

The first calls, in the order I'd make them. After that, people help.

Use pages 38 to 44 for the send-off.

My wishes are written there. They're requests, not rules.

Tell Willzee.

Page 2 says how. From then on, they help you with the rest.

Money for the funeral. A bank will usually release it from my account against the funeral invoice and a death certificate, before anything else is sorted.

The first month.

Nothing gets sold. Not even the ugly chair.



Find the signed original of my Will.

Page 3 says where it's kept. The signed paper is the one the law acts on; Willzee holds the record of it.

Leave everything where it is.

Don't sell, give away or throw out anything yet, including the car and the contents of the house. That comes later, and with the Will in hand.

Stop the bills on page 22.

Subscriptions, memberships, anything charging my card. Keep the power and insurance on the house going.

Collect the mail and keep the receipts.

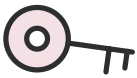
Anything you pay for the estate comes back to you from it. A shoebox is fine.

Tell the organisations on page 44.

They each need a death certificate. There's no rush on most of them.

Pets and anyone who depends on me are on pages 26 to 30. They can't wait a month.

What Willzee does, and what you decide.



Willzee holds the record of my Will and the choice I made about who helps you with the estate: a Willzee legal partner, or a provider I named. That choice is my preference. You stay in charge, and you can choose differently if you need to.

Probate.

For most estates above a modest size, a court grant is needed before banks and others will act. It takes months, not weeks, and the legal partner handles the paperwork.

Small estates.

Some estates can be wound up without a grant. Willzee will tell you if mine is one of them, and what that involves.

The fee.

It comes out of the estate before anything is shared. You'll see it in full before anyone is engaged.

Questions.

Ask Willzee first. If it's a legal question, they'll put you with the legal partner, and the hours are counted.

Willzee's role, in a sentence. Keep my record, help you find your feet, and put the lawyer's work on preferred terms.

What you don't have to do.

This page is the important one.

Do it alone.
Willzee, the legal partner and the people on page 12 are there to be used. Use them.

Do it quickly.
Nothing in an estate is lost by taking a few weeks. Plenty is lost by rushing.

Agree to anything a relative pushes for.
The Will decides who gets what. Not the loudest voice in the room.

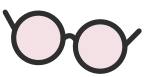
Pay for anything yourself.
Estate costs come from the estate. Keep the receipts and claim them back.

Carry the upset.
If someone named in my Will is unhappy, that's normal, and it's Willzee's and the lawyer's job to deal with, not yours.



Thank you.
I chose you because I trusted you to do this well, and slowly, and with a cup of tea. You're already doing it.

How this book works.



Use pencil. Things change.

My Will says who gets what and who is in charge. This book is everything else: where things are, what I'd like, and the small stuff nobody thinks to ask until it's too late.

This	Lives in	And here
Who gets what	**My Will**	
My executor	**My Will**	
A guardian for my children	**My Will**	Details, page 26
Gifts of money or items	**My Will**	Stories, page 23
Funeral wishes	**This book**	And Schedule D in the app
Where things are kept	**This book**	
Passwords and PINs	**Nowhere**	Only where to find them, page 32



A wish, not an instruction.
My executor stays in charge, and Willzee holds the record of what my Will actually says.

Four habits.

Pencil, remember.



- [ ] Date every page you fill in.
- [ ] Keep it somewhere my executor knows about.
- [ ] Write where things are, never passwords or account numbers.
- [ ] Copy anything important into my Willzee app.

If this book and my Will disagree

My Will wins, every time. If I've written a wish here that my Will doesn't mention, treat it as a wish. My executor decides how far it can go.

Where I keep this book

Who knows about it

Changed something big? Change your Will too. Updating a Foundation Will costs nothing in the Willzee app.

About me.

Yes, that is my real middle name.



Full legal name .....

Known as .....

Other names I have used .....

Date of birth ..... **Place of birth** .....

Citizenship .....

Occupation .....

My IRD number is kept .....

My passport is kept .....

My doctor .....

A tidy shortcut. Put every document in one folder and write the folder's hiding place once, on the next page. Then the only secret is the folder.

Where my documents live.



Not the numbers. Just where to find them.

Document	Kept *e.g. blue folder, hall cupboard*
Birth certificate	
Passport	
Driver licence	
Marriage certificate	
Title to my home	
Insurance policies	
Enduring power of attorney	
My signed Will (the original)	
This book, the latest copy	

Who to call first.

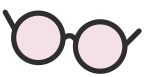


The neighbour has the spare key. Probably.

The first few calls, in the order I'd make them. Phone numbers change, so write them in pencil.

Who	How they fit in *e.g. sister, Dunedin*	Phone
My executor	.....	.....
My partner	.....	.....
	.....	.....
	.....	.....
	.....	.....
	.....	.....
	.....	.....
	.....	.....
	.....	.....
	.....	.....

And the professionals.

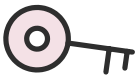


Doctor, lawyer, accountant, employer. Whoever needs to know.

Who	Role	Phone

The first call is the hardest. After that, people help. Tell them this book exists, and that page 2 says what to do.

Where things are.



Top drawer. Under the takeaway menus.

Thing	Where it is *e.g. hook by the back door*
House keys and spares	.....
Car keys	.....
Safe, if I have one	.....
The signed original of my Will	.....
Important papers	.....
Spare cash, if any	.....
Storage unit, garage, shed	.....
Things I'm minding for others	.....
	.....
	.....

Who else has a key.



To the house, the car, the storage unit. And the safe, if there is one.

Who	A key to

Safe codes and PINs stay out. Write who knows the code, or where it's sealed away, on page 32.

Schedule A: Assets & Gifts

What I own, and what I owe.



Rough numbers. Nobody's auditing.

Rough values are fine. Nobody is auditing you. This section gives my executor a map of what exists and where to look, so nothing gets missed and nothing keeps charging my card.

In these pages

Property 17

Vehicles 18

Bank accounts 19

KiwiSaver and insurance 20

What I owe 21

Bills to stop 22

Things with a story 23

The same schedule lives in your Willzee app as Assets & Gifts. Whatever you write here, add it there too, so your executor gets it with your Will.

Schedule A: Assets & Gifts

Property.



Note how it's owned. Jointly owned homes usually pass straight to the other owner.

Address .....

Owned ..... **Mortgage with** .....

Papers are kept .....

Address .....

Owned ..... **Mortgage with** .....

Papers are kept .....

Address .....

Owned ..... **Mortgage with** .....

Papers are kept .....

Schedule A: Assets & Gifts

Vehicles, boats, caravans.

Make, model, rego	Kept at	Finance with

Notes for the next owner

Tenants, a boundary dispute, the gate that sticks, the car that needs a warrant.

Done? Add it to your Willzee app.

Copy this into Assets & Gifts, so your executor gets it with your Will.

Schedule A: Assets & Gifts

Bank accounts.



Last four digits only. Burglars, see page 32.

Bank	Account	Last four

Good to know. Joint accounts usually pass straight to the other owner. KiwiSaver is paid to my estate and is covered by my Will.

Schedule A: Assets & Gifts

KiwiSaver, investments, insurance.



KiwiSaver and investments

Provider or platform	What it is	Roughly

Insurance

Insurer	Type of cover	Papers kept

Schedule A: Assets & Gifts

What I owe.

Including the twenty bucks to Dave.

Mortgage, loans, credit cards, buy now pay later, money owed to a friend. And money owed to me.

Who	What for	Roughly

Money owed to me? Put it here too, with who and how much. Executors rarely find these on their own.

Schedule A: Assets & Gifts

Bills to stop.



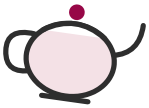
Cancel the gym. I was going to go.

Everything that charges me automatically. Tick the ones to cancel.

What *e.g. power, Example Energy*	Paid how	Keep	Cancel
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐

Schedule A: Assets & Gifts

Things with a story.



The good scissors. You know the ones.

The watch, the recipe book, the ugly vase that means something. These are wishes for my executor. They only become gifts if they're in my Will.

The thing .....

I'd love it to go to .....

Its story

.....

.....

The thing .....

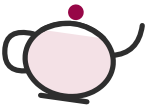
I'd love it to go to .....

Its story

.....

.....

More things with a story.



The thing .....

I'd love it to go to .....

Its story

.....

.....

The thing .....

I'd love it to go to .....

Its story

.....

.....

The thing .....

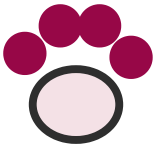
I'd love it to go to .....

Want it to be certain? Make it a gift.

Add it as a specific gift in your Willzee app and it goes into your Will. Here, it's a wish your executor will try to honour.

Schedule B: Care & Guardianship

Who depends on me.



Feed them before you feed yourselves.

Who looks after whom, what they need each day, and the things only I know. Guardians for children are named in my Will. The daily detail lives here.

In these pages

My children 26

More about my children 27

My pets 28

More about my pets 29

Others who depend on me 30

The same schedule lives in your Willzee app as Care & Guardianship. Whatever you write here, add it there too, so your executor gets it with your Will.

Schedule B: Care & Guardianship

My children.

Their guardian is named in my Will. This is what a guardian needs on day one: routines, allergies, the teddy that can't be lost.

Name ..... **Born** .....

School or daycare ..... **Doctor** .....

Daily routine

.....

.....

.....

Things they need, things they fear, things that help

.....

.....

.....

.....

.....

Schedule B: Care & Guardianship

More about my children.

Name ..... Born .....

School or daycare ..... Doctor .....

Daily routine

.....

.....

.....

Things they need, things they fear, things that help

.....

.....

.....

.....

.....

What I'd want for them. Schooling, faith, sport, time with both sides of the family. Write it on page 46 in your own words.

Schedule B: Care & Guardianship

My pets.

He's not allowed on the couch. He is allowed on the couch.

Name ..... **What they are** .....

Vet ..... **Food, and how much** .....

Who has agreed to take them .....

Quirks, medication, what they're scared of

.....

.....

.....

.....

.....

.....

Pets can't inherit, but my Will can leave money to the person who takes them on. Ask Willzee how.

Schedule B: Care & Guardianship

More about my pets.

Name ..... What they are .....

Vet ..... Food, and how much .....

Who has agreed to take them .....

Quirks, medication, what they're scared of

.....

.....

.....

.....

.....

.....

Done? Add it to your Willzee app.
Copy this into Care & Guardianship, so your executor gets it with your Will.

Schedule B: Care & Guardianship

Others who depend on me.



A parent I check on. A neighbour I shop for. Anyone whose week changes if I'm not around.

Who ..... **Connection** .....

What I do for them, and how often .....

Who could step in .....

Who ..... **Connection** .....

What I do for them, and how often .....

Who could step in .....

Who ..... **Connection** .....

What I do for them, and how often .....

Who could step in .....

Enduring power of attorney. If I've made one, it's for while I'm alive and can't decide for myself. Where it's kept is on page 11.

Schedule C: Digital Legacy

My online life.



Eleven years of photos. Three good ones.

Photos, email, banking, the accounts that keep charging. This section says where the keys are kept, never the keys themselves, and what I'd like done with each account.

In these pages

Where the keys are 32

Who knows the way in 33

My accounts 34

My photos 35

Things I made 36

The same schedule lives in your Willzee app as Digital Legacy. Whatever you write here, add it there too, so your executor gets it with your Will.

Schedule C: Digital Legacy

Where the keys are.



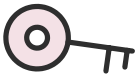
Not the keys themselves. Burglars can read too.

No passwords, PINs or recovery phrases in this book. Write down where each one is kept: a password manager, a sealed envelope, a legacy contact.

What	Where the way in is kept *e.g. sealed envelope, lawyer*	Legacy contact?
My phone passcode	.....	☐
My password manager	.....	☐
My main email	.....	☐
Apple or Google account	.....	☐
Online banking	.....	☐
My photos	.....	☐
Work accounts	.....	☐
Anything else that matters	.....	☐
	.....	☐
	.....	☐

Schedule C: Digital Legacy

Who knows the way in.



The person or people who can find the envelope, the manager, the key.

Five-minute jobs

Free settings that let someone you trust in. Tick when done.

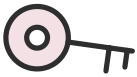
- ☐ Google: Inactive Account Manager
- ☐ Apple: Legacy Contact
- ☐ Facebook: Legacy Contact
- ☐ Password manager: emergency access



Done? Add it to your Willzee app.
Copy this into Digital Legacy, so your executor gets it with your Will.

Schedule C: Digital Legacy

My accounts.



Nobody needs to see the drafts folder.

One line per account. Tick what should happen to it.

Account *e.g. Facebook*	Keep	Memorialise	Close
.....	☐	☐	☐
.....	☐	☐	☐
.....	☐	☐	☐
.....	☐	☐	☐
.....	☐	☐	☐
.....	☐	☐	☐
.....	☐	☐	☐
.....	☐	☐	☐
.....	☐	☐	☐
.....	☐	☐	☐
.....	☐	☐	☐
.....	☐	☐	☐
.....	☐	☐	☐

Memorialise keeps a profile up as a memory. **Close** deletes it. Most platforms need a death certificate either way.

Schedule C: Digital Legacy

My photos.



The one with the hat. Use that one.

Place	What's there	Who can get in
My phone		
Cloud (Apple, Google)		
Computer or hard drive		
Boxes and albums		

The photo to use

For the service, the notice, the fridge.

Schedule C: Digital Legacy

Things I made.

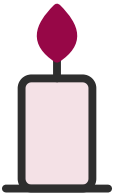


Writing, music, recipes, a half-built boat. Where they are and what I'd like done with them.

Done? Add it to your Willzee app.
Copy this into Digital Legacy, so your executor gets it with your Will.

Schedule D: Funeral Wishes

The send-off.



A few requests. You don't have to take all of them.

A few requests for the people planning it. None of this is binding, and they'll do their best. Writing it down means they don't have to guess, and don't have to argue.

In these pages

The basics 38

Anything else about the basics 39

Music and words 40

Flowers, food and dress 41

Paying for it 42

Who to tell 43

Organisations to notify 44

The same schedule lives in your Willzee app as Funeral Wishes. Whatever you write here, add it there too, so your executor gets it with your Will.

Schedule D: Funeral Wishes

The basics.



I'd prefer

☐ Burial ☐ Cremation ☐ Natural burial ☐ I don't mind

Where, if I have a place in mind .....

Ashes, if that applies .....

A service

☐ Yes, a traditional one ☐ Something informal ☐ A private farewell only

☐ No service

Faith or tradition to follow .....

Who should lead it .....

Organ and tissue donation

☐ Yes, if possible ☐ No ☐ Already registered

Schedule D: Funeral Wishes

Anything else about the basics.



Timing, customs, a place that matters, people who must be there.

Cultural or religious wishes often come with their own timing and customs. If that matters to me, I've written it above so nobody has to ask.

Music and words.



No slow songs. Or all slow songs.

Music

To arrive to, to leave to, and anything in between.

Readings or words

Who I'd like to speak

Schedule D: Funeral Wishes

Flowers, food and dress.



Sausage rolls. Non-negotiable.

Flowers, or a donation instead to

Dress code

Food and drink afterwards

Done? Add it to your Willzee app.
Copy this into Funeral Wishes, so your executor gets it with your Will.

Schedule D: Funeral Wishes

Paying for it.

Don't spend a fortune. I won't notice.

Have I already arranged anything?

- [ ] A prepaid funeral plan
- [ ] Funeral insurance
- [ ] A plot or a place
- [ ] Nothing yet

With whom .....

Papers are kept .....

A funeral director I'd choose, if any .....

Roughly what I'd want spent .....

Notes for the planner

.....

.....

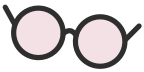
.....

.....

.....

A bank will often release money for the funeral before the estate is sorted, with an invoice and a death certificate.

Who to tell.



Beyond the first calls on page 12. The friends from way back, the club, the old workmates.

Name *e.g. old flatmate, Wellington*	How to reach them	Who tells them

Organisations to notify.



The ones that need a death certificate. Tick as they're done.

- [ ] Bank and KiwiSaver provider
- [ ] Insurers
- [ ] Employer or business partners
- [ ] Inland Revenue
- [ ] Landlord, or the property manager
- [ ] Clubs, memberships, subscriptions
- [ ] Power, phone, internet
- [ ] Doctor and dentist
- [ ] Electoral roll
- [ ] Willzee

And these

Willzee is on the list too. Once Willzee knows, they help my executor with the rest. Page 2 says how.

Things I'd like to say.



Don't read these in the kitchen. Sit down.

A few lines to the people who matter. Or a note that says there's a longer letter, and where it is.

To .....

To .....

Things I never told you.



Write it down before you forget it. I did.

The recipe everyone asks for

Advice I'd give, if asked

What I'd want for the kids, the garden, the dog, the house

Keep it fresh.

Review it every birthday. Mine, not yours.



A marriage, a split, a baby, a house, a new job, a dog. Each one changes a page in here, and some change my Will. Tick the first box once the change is in my Willzee app, and the second if my Will itself was updated.

Date	What changed *e.g. new car, page 22*	Copied to app	Will changed
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐
.....	.....	☐	☐



Changed something big? Change your Will too.
Updating a Foundation Will costs nothing in your Willzee app. Sign in, change it, print and sign it again.

Make a Will. Then keep this book with it.

A Foundation Will with Willzee costs nothing in your lifetime and takes about ten minutes. This book is the guidance that goes with it.

app.willzee.com

Choose "Reporting a death?"

hello@willzee.com

No Will yet? Make one at app.willzee.com. It's free.

willzee

General guidance to sit alongside a Will. Not legal advice.