

WILLS WEEK INSTRUCTION PACK



DEFINITIONS - Any definitions used throughout this document are not a substitute for legal advice. Further advice should be sought from a solicitor in relation to all terms used and in order to understand its legal meaning for your circumstances.

*** THIS FORM MUST BE COMPLETED AND DELIVERED TO THE SOLICITOR BY EMAIL, POST, OR IN PERSON BY 6 MARCH 2026. FOR COUPLES, PLEASE ENSURE ONE FORM IS COMPLETED EACH.**

YOUR DETAILS

Full Name (incl middle name/s)

Address

Town

Postcode

Email Address

Occupation

Phone

Date of Birth

Location of birth

Married: **yes** **no** Date

De Facto: **yes** **no** No. of years

PREVIOUS WILL If you have made a will previously, please provide:

Date: _____ Legal Firm/Provider _____

SPOUSE/DE FACTO/PARTNER

Full Name (incl middle name/s)

Date of Birth

Location of birth

Occupation

Previous Relationships:

a) Married / De Facto

b) Length of relationship

c) Date (start and finish date of relationship)

d) Location

e) Was there a formal divorce or property settlement done? **yes** **no**

CHILDREN (please include all of your children)

FULL NAMES incl middle name/s

AGES

NATURALLY BORN/
ADOPTED/OTHER

MARRIED
(YES/NO)

NUMBER
OF CHILDREN

AGES

Children from a previous relationship:

Do you provide any foster care? **yes** **no** Provide details

Please provide any more details about your children you wish to include:

Would you like to appoint a guardian/s for your children? If so, please provide their name/s

BENEFICIARY/IES

A Beneficiary can be a person or entity that you want to leave your whole or portion of your estate to, or to leave a gift to under your Will. Your estate will consist of all the property held by you when you die.

(1) Will you leave your whole estate to your spouse/de facto? yes no

(2) If not, who will you leave your estate to

(3) If your spouse or partner has died, who do you want to be your alternate beneficiaries and how much would you like to leave each?

(4) If not, who will you leave your estate to and how much to you want to leave to each of those Beneficiaries?"

EXECUTORS/TRUSTEES

An Executor or Trustee is the person responsible for carrying out the wishes of a person contained in their will after they die. The role of the Executor is to manage the estate within the terms of the Will and protect the assets of the estate. This person could be your spouse/de facto/partner for example.

(1) Name Relationship

Address

Town

State

Postcode

(2) Name Relationship

Address

Town

State

Postcode

ALTERNATE EXECUTORS

If your chosen executors or trustees are unable or unwilling to serve as your executor/s, who do you want to appoint as a substitute executor to carry out your wishes?

(1) Name Relationship

Address

Town

State

Postcode

(2) Name Relationship

Address

Town

State

Postcode

ALTERNATE BENEFICIARIES

In the event of your spouse and also your children dying, you can leave your estate to your current and/or future grandchildren.

If you have grandchildren, then in the event of your child dying do you want to:

(i) Share that child's share amongst your grandchildren in equal shares yes no

If yes at what age (please tick) 18 21 other

(ii) Or if no, amongst the other surviving children (ie. Your other children to receive a greater share) yes no

(iii) If no to both, then other

POWER OF TRUSTEES

Are the Trustees of your will to have any power over your assets/estate or use of money to provide for your children (please tick) yes no

If yes, then what power?

BEQUESTS

Would you like to leave a bequest to the Westpac Rescue Helicopter Service or another charity of your choice? If yes, please indicate which charity/s and the value of the gift you would like to make to them. To find out more about how a bequest can help the Westpac Rescue Helicopter Service to save lives, please see the information on pages 4-5.

POWER OF ATTORNEY (Optional) This is not included in your Wills Week fee and is subject to additional charges if required.

A Power of Attorney is a document that you can make to appoint a person to look after your assets and financial affairs on your behalf while you are alive. This can also apply if you have lost capacity.

Are you interested in a Power of Attorney? yes no

This will be discussed further at your appointment and will be subject to additional costs.

ENDURING GUARDIANSHIP (Optional) This is not included in your Wills Week fee and is subject to additional charges if required.

An enduring guardian is a person who you can appoint to make decisions on your behalf and protect your interests if you have lost capacity. The guardian could make decisions on your behalf about where you live and the health care and personal services you receive.

Are you interested in an Enduring Guardian? yes no

This will be discussed further at your appointment and will be subject to additional costs.

ASSETS

Do you own your own home?

Do you have any investment properties?

Do you have any superannuation? If yes, is it a self-managed superannuation fund?

Do you own any shares or other investments?

Do you own your own business?

Do you have any shares in any partnerships?

Do you have any other assets?

IS THERE ANYTHING ELSE YOU WOULD LIKE TO TELL YOUR SOLICITOR? eg; funeral wishes

Signature

Date

PRIVACY STATEMENT: Your information is being collected by Northern NSW Helicopter Rescue Service Limited (ABN 40 002 862 026) (trading as Westpac Rescue Helicopter Service) for the purpose of registering your participation in Wills Week including for us to supply that information to your chosen solicitor. Supply of this information is voluntary, but we may be unable to process your participation without it. We may use your personal information for the related purpose of sending you marketing materials which we think may interest you as a valued supporter. You can opt-out of receiving these communications at any time by contacting us. Your personal information may also be provided to third parties where required by law. Our Privacy Policy (available on our website at www.rescuehelicopter.com.au) contains information about accessing and seeking correction of your personal information, making a privacy-related complaint and our complaint-handling process. It also sets out our usual disclosure practices, including any overseas disclosure. For all privacy matters, please contact us by sending an email to enquiries@rescuehelicopter.com.au or by telephone on 02 4952 0000.

TERMS & CONDITIONS Refunds will only apply if your appointment is cancelled at least 5 business days prior to your appointment date. Please note your booking does not cover the drafting of any other estate planning documentation, including Power of Attorney or Enduring Guardian documents. The cost (\$160.00 for a single person or \$300.00 for a couple) will cover a ½ hour appointment for a single person, or a 1 hour appointment for a couple with your chosen solicitor. Should there be conditions you wish to have placed into your Will that are deemed by the participating solicitor to be over and above a 'simple' Will, the solicitor may provide instructions to you that a follow up booking be made with their firm and this will be at your own cost and not covered by the donation. Your Will is being prepared by a solicitor and we, the Westpac Rescue Helicopter Service, are not providing any legal advice as part of this process. The Westpac Rescue Helicopter Service does not have any access to the information contained on your Wills Week Instruction Form or details you place in your Will. All information remains strictly confidential between you and your solicitor.



▶ Leaving a Bequest to Help Save Lives

Leaving a gift in your Will can make a real impact and will help your local Westpac Rescue Helicopter Service to provide care for regional and remote communities in critical moments!

To establish a bequest in your Will please find over the page information that will assist your solicitor or estate planner to ensure that your wishes are followed. Importantly, you may also choose to specify the region you wish to support by nominating one of our bases in Newcastle, Tamworth or Lismore.

TYPES OF GIFTS

RESIDUARY

The act of gifting the remainder of your estate after all gifts have been dispersed to specific individuals or organisations in accordance with your wishes.

PERCENTAGE BASED BEQUEST

A percentage of your general estate (i.e. all the funds, properties or assets against your Will), or a percentage of the residuary once gifts and other costs have been processed in accordance with your wishes.

PECUNIARY GIFT

A specific dollar value (i.e. \$1,000)

ACKNOWLEDGING YOUR SUPPORT

You are under no obligation to inform us of your bequest and if you would prefer to keep your decision private, we will respect your wishes. However, we would be honoured to acknowledge and thank you for your support with all information you share treated in the strictest confidence.

If you would like, we can arrange a visit to one of our helicopter bases so you and your family can see the impact your support will have firsthand. This would also be an opportunity to show you our legacy honour boards located at each base where we display the names of those who have given a bequest. To arrange a visit or if you have further questions, please contact our Major Gifts and Donors Manager, Zeke Huish;

- email zeke.huish@rescuehelicopter.com.au
- or phone 0431 266 291

For more details about how to establish a bequest, please visit rescuehelicopter.com.au





Information for Solicitors & Estate Planners

SUGGESTED WORDING

The following words are recommended as a guide only to assist in preparing a Will with a bequest to the Westpac Rescue Helicopter Service.

I give and bequeath to Northern NSW Helicopter Rescue Service Limited ABN 40 002 862 026 (trading as Westpac Rescue Helicopter Service) for its general purposes:

(choose the appropriate bequest option below for your will)

The whole of my estate; or

_____ % of my estate; or

the Sum of \$ _____; or

the residue of my estate; or

my property/asset (and insert description of property or asset) free of all duties.

The receipt of the Secretary or other authorised officer shall be a sufficient discharge to my Executor in respect of the gift made under this clause.

Optional wording - I wish for this gift to go towards the rescue helicopter service based in Newcastle/Tamworth/ Lismore.

It is not necessary to nominate a particular base. However, your client may like to specify a region they wish to support with funds to be allocated to one of our bases in Newcastle (Belmont), Tamworth or Lismore. We will ensure their wishes are followed due to the dedicated Trust boundaries we have in place.

ADMINISTRATION OF AN ESTATE

When it is time to administer an estate in which a gift has been left to the Westpac Rescue Helicopter Service, we would appreciate your assistance by:

- Notifying us of the gift in the will. We ask that you also provide us with a copy of the will or probate for the estate as this allows us to match the testator to our donor records and also identifies any restrictions attached to the use of the bequest.
- Telling us about your client as we would welcome the opportunity to thank the executor and the family in honour of the testator's memory.

These actions allow us to respect your client's final wishes and honour their memory by placing their name on our honour boards located at our bases and to maximise the impact of their donation.

If your client has decided to leave a bequest to the Northern NSW Helicopter Rescue Service Limited you can be assured we will honour their wishes, use their gift carefully and cost-effectively, and treat it with the respect and sensitivity it deserves. Please encourage your client to notify us of their inclusion of the Westpac Rescue Helicopter Service in their Will so we can keep in contact with updates from the Service.

CONTACT US

For any enquiries regarding bequests, the administration of an estate or how you can participate in our Wills Week promotion, please contact Major Gifts and Donors Manager, Zeke Huish, by:

- email zeke.huish@rescuehelicopter.com.au
- or phone 0431 266 291.