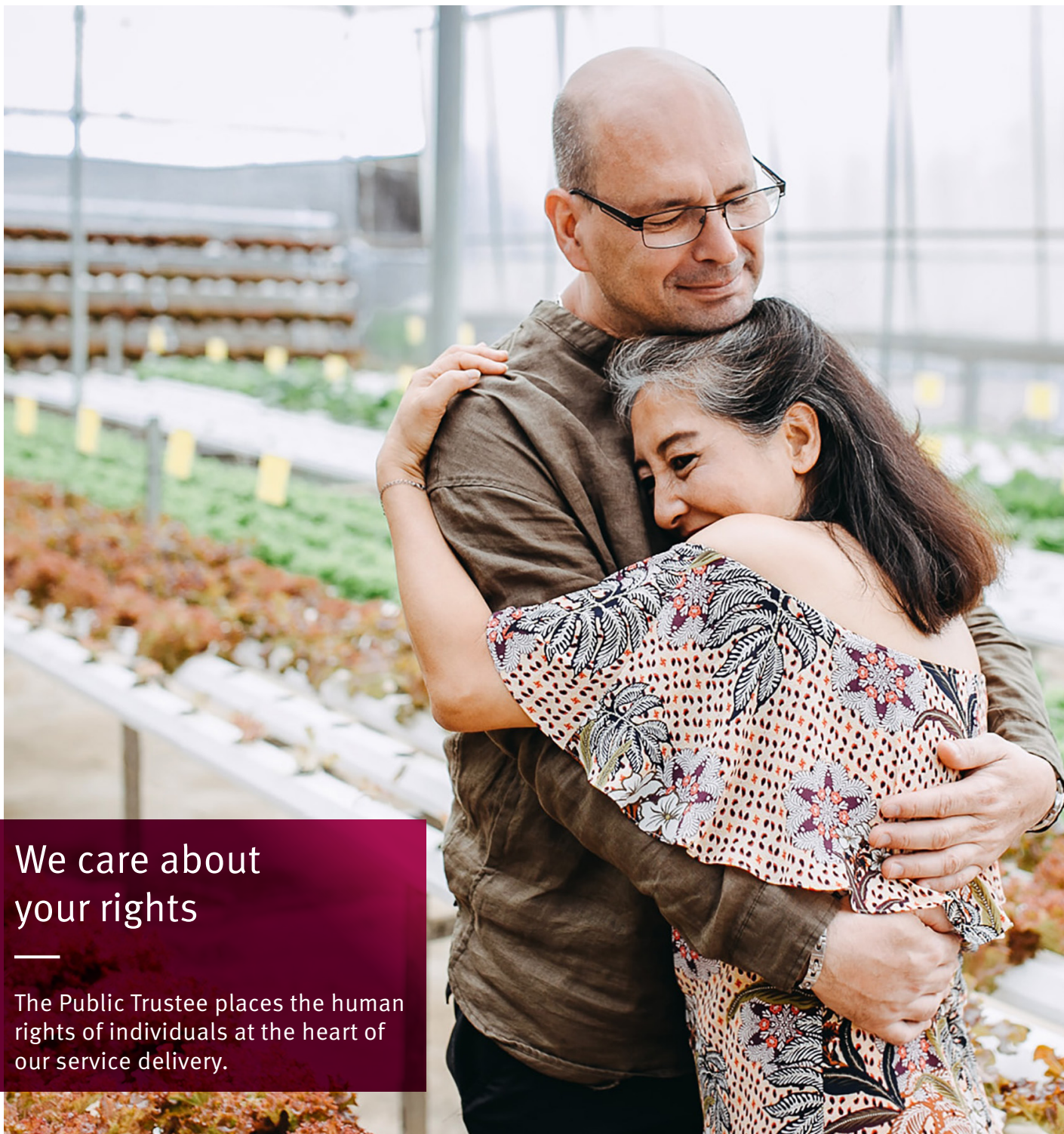


# Let's talk about **Wills**

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A Will is a living document  
that accompanies you on  
your life's journey





## We care about your rights

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The Public Trustee places the human rights of individuals at the heart of our service delivery.

# How can the Public Trustee help?

## We give peace of mind.

The Public Trustee has more than 100 years of experience in Wills and estate law.

Whether you need to make your first Will, or update an existing Will, our accredited will-writers can help you record your final wishes and how you would like them to be carried out.

We understand the law and our expertise has been gained from a century of helping Queenslanders over the emotional and legal hurdles that come with writing a Will.

## Make an appointment

You can book an appointment with a professional at a network of offices across the State.

Visit our website at [www.pt.qld.gov.au](http://www.pt.qld.gov.au) or call us on **1300 360 044**.

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# Why do I need a Will?

Just by starting work, you are worth more than you think; that's why everyone over the age of 18 should make a Will, regardless of what you own.

By making your Will, you are ensuring that the right people are provided for after you pass away.

It also ensures that your assets are distributed according to your wishes, and that the people managing your estate understand how you would like your affairs managed, avoiding additional costs or possible lengthy 'who gets what' court battles.

## What if I die without a Will?

If you die without a Will, the *Succession Act 1981* sets out the rules for distributing your assets.

This may mean:

- you will not have a say about who will benefit from your estate
- the cost to settle your estate may be significantly more than if you had written a Will in the first instance
- it may take longer to finalise your estate, and
- you place an extra burden on your loved ones at a time of grief and loss.





## Benefits of making your Will with the Public Trustee

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- We are independent advisors. We can be an impartial voice at an emotional time.
- We ask the right questions, including those you may not have considered.
- Our will-making service is provided free to all Queenslanders over the age of 18.
- We keep your Will safe, for free, in our state-of-the-art, temperature controlled Wills bunker.

## When should I make or update my Will?

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A Will should be a part of your life's journey; as your life changes, your Will should change too and be updated to reflect those changes.

### Important life stages may include:

- birth of a child or grandchild
- marriage, separation or divorce
- entering into a civil partnership
- death of a spouse, partner or executor
- retirement
- changing residence (moving to another state or country)
- significant changes to your assets or finances.

# Where can I make a Will with the Public Trustee?

At a network of offices around the State.

If you don't live near one of our offices, you may be able to make a Will at one of our outreach services.

These are available at certain times at certain courthouses—QGAP offices and Centrelink offices.

See our website for the full list of outreach services and times of availability.

# What do I bring to my Will appointment?

**You should think about:**

- addresses of property you own
- shares or investments
- vehicles (cars, caravans, boats etc.)
- superannuation / insurance
- bank accounts / term deposits
- other items, especially those of higher or sentimental value (e.g. art, jewellery, service medals)
- your wishes in relation to the guardianship of any children under the age of 18 years, or
- your wishes in relation to who will care for your pets.

# What identification do I need?

You must bring ONE of the below identification



## What is an executor?

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Your executor is responsible for administering your estate after you die.

There's a lot involved, and your executor can be held personally liable if something goes wrong.

**Executors must follow the requirements of the *Succession Act 1981*.**

Among other things, this includes:

- obtaining probate (the legal authority to handle the estate) from the Supreme Court of Queensland
- locating and notifying beneficiaries
- ensuring suitable insurance coverage for assets
- determining debts and liabilities
- finalising tax matters
- distributing the estate
- providing accounting to the beneficiaries, and
- defending any legal action against an estate.

## What to consider when choosing your executor

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**Choosing an executor of your Will is almost as important as the Will itself.**

Ask yourself:

- Do they have an understanding of law, accounting, taxation and business practices?
- Do they have the ability to act as trustee?

**Appointing a loved one as your executor, may place an extra burden on them at a time of grief and loss.**

Ask yourself:

- Will your choice of executor cause conflict among your beneficiaries?
- Is your executor willing and able to administer your estate—and will they be there when needed?







## Benefits of appointing the Public Trustee as your executor

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We are independent advisors. We can be an impartial voice at an emotional time.

- Our staff are compassionate, empathetic and skilled at managing estates during times of grief and family conflict—and they're supported by a team of legal, finance and investment professionals.
- We charge a competitive fee based on the work involved, **not a percentage commission** to finalise your estate.
- By law (the *Public Trustee Act 1978*), our fees **must be reasonable**.

## Other times the Public Trustee may handle an estate

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We may also handle estates where:

- the executor does not act within three months
- the executor is not a resident in Queensland
- the executor has died, or
- there is no Will and the Public Trustee is requested to do so by the next of kin.



## What is probate and how do I get it?

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If a loved one passes away, there are certain steps that may be required in order to take care of their finances. In some cases, obtaining a 'grant of probate' from the Supreme Court of Queensland is one of those steps.

A 'grant of probate' issued by court recognises that the Will is legally valid and the executor is authorised to deal with the estate.

Obtaining probate can be complicated and involves advertising, completion and filing of legal documents with the Supreme Court. Often, executors need some assistance to do this.

For a competitive fee, we can help you with probate.

Please contact us to discuss your options by calling **1300 360 044**.

## Protecting your privacy

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The Public Trustee collects and manages personal information in the course of performing its activities, functions and duties in accordance with the *Public Trustee Act 1978*.

The way in which the Public Trustee manages personal information is governed by the *Information Privacy Act 2009*.

This means there are restrictions on how we can use, and when we can disclose, your personal information.

We do not disclose your personal information outside of the Public Trustee unless we are required to do so by law or unless you have given us your consent to such disclosure.

If you would like to read our Privacy Statement, please visit our website at:  
**[www.pt.qld.gov.au/site-footer/privacy](http://www.pt.qld.gov.au/site-footer/privacy)**



## Your nearest Public Trustee office

Birtinya

Brendale

Brisbane

Bundaberg

Cairns

Gladstone

Ipswich

Mackay

Maryborough

Mount Isa

Redcliffe

Rockhampton

Southport

Toowoomba

Townsville

We also offer a range of outreach services in other areas of Queensland. Go to **[www.pt.qld.gov.au/contact/locations](http://www.pt.qld.gov.au/contact/locations)** to find your nearest service location.

To learn more about Wills, probate, executor services, or to book an appointment, you can:

call us on

**1300 360 044**

visit our website

**[www.pt.qld.gov.au](http://www.pt.qld.gov.au)**

**Human Rights**

Respect · protect · promote