



NSW Trustee
& Guardian

‘It’s simple,
it’s secure, it’s
taken care of.’

WILL SAFE

Secure storage for your Will, Power of Attorney and Enduring Guardianship



Secure
document storage



\$29
one-off fee



Digital copies
made and stored



Easily accessible
make an appointment

WILL SAFE

Many people store their Will at home where it can be stolen, lost or damaged. If a Will cannot be located when required, it could cost your estate thousands of dollars in additional costs. There is also a serious risk your assets will not be distributed as you would have intended.

When you store your Will, Power of Attorney and Enduring Guardianship documents in our Will Safe:

- they can be easily accessed when needed
- electronic copies are made for added security

What documents can be stored?

- Will
- Power of Attorney
- Enduring Guardianship
(and/or Advance Care Plan/Directive)

Having all your paperwork in one place greatly reduces the difficulty of managing your estate or making new arrangements if you lose capacity or pass away.



How to deposit and retrieve your documents

Step 1

Phone **1300 10 20 30** to make an appointment at your local NSW Trustee & Guardian branch.

Step 2

Attend your appointment and bring:

- your original signed and witnessed document(s)
- one form of current identification e.g. passport, driver's licence, pension card, or health card
- a completed deposit form

Step 3

Leave your document(s) with NSW Trustee & Guardian and pay your deposit fee. Fees can only be paid by EFTPOS, Visa or Mastercard (no cash, cheque, American Express or Diners Club cards are accepted).

Fees

Single document deposit (Will, Power of Attorney or Enduring Guardianship)	\$29
Deposit up to three documents	\$49
Deposit up to three documents for NSW Seniors Card holders	\$29

- document storage is free of charge for clients who appoint NSW Trustee & Guardian as their executor or attorney (including first-named substitute after a solely appointed executor or attorney)
- no additional cost for the number of years you store your documents
- no cost for retrieval

We recommend that you tell your executor where your Will is stored. If you die, your executor can contact NSW Trustee & Guardian to retrieve the Will. Similarly, you should inform your attorney where your power of attorney is stored and your guardian where your enduring guardianship is stored.

How to retrieve your document from Will Safe

If you would like to retrieve your original document, simply call **1300 10 20 30** and we can arrange for it to be delivered to your nominated branch for collection. Please allow five working days for delivery.

Will Safe Deposit form

To deposit your Will and/or Power of Attorney and/or Enduring Guardianship in our Will Safe, please make an appointment at one of our branches. Complete this form, and bring it to your appointment with:

- your original document(s) to be stored
- one form of current identification e.g. passport, driver's licence, pension card, or health card

See www.tag.nsw.gov.au for details of our locations or call **1300 10 20 30**. Open 9:00am to 5:00pm (Mon to Fri).

I wish to deposit: Will Power of Attorney Enduring Guardianship and/or Advance Care Plan/Directive

Are you an existing NSW Trustee & Guardian client? Yes No

Your details

Mr Mrs Ms Miss Dr Other _____ (please specify)

Surname: _____ Given names: _____

Address: _____

Suburb: _____ State: _____ Postcode: _____

Telephone: _____ Mobile: _____

Email address: _____ Date of birth: _____ / _____ / _____

Will details (cross out this section if not applicable)

Is this your current Will? Yes No

Date of Will: _____ / _____ / _____ No. of pages: _____

Executor details

Mr Mrs Ms Miss Dr Other _____ (please specify)

Surname: _____ Given names: _____

Address: _____

Suburb: _____ State: _____ Postcode: _____

Telephone: _____ Mobile: _____

Email address: _____ Date of birth: _____ / _____ / _____

Further/alternative executor (if applicable)

Mr Mrs Ms Miss Dr Other _____ (please specify)

Surname: _____ Given names: _____

Address: _____

Suburb: _____ State: _____ Postcode: _____

Telephone: _____ Mobile: _____

Email address: _____ Date of birth: _____ / _____ / _____

Have you informed your executor that he/she is the executor of your Will and that the Will is stored in Will Safe?

Yes No

If you have answered 'No', please ensure that you do inform your executor that your Will is stored in our Will Safe.

Power of Attorney (POA) details (cross out this section if not applicable)

Is this your current POA? Yes No Date of POA: _____ / _____ / _____ No. of pages: _____

Attorney details

Mr Mrs Ms Miss Dr Other _____ (please specify)

Surname: _____ Given names: _____

Address: _____

Suburb: _____ State: _____ Postcode: _____

Telephone: _____ Mobile: _____

Email address: _____ Date of birth: _____ / _____ / _____

Further/alternative attorney (if applicable)

Mr Mrs Ms Miss Dr Other _____ (please specify)

Surname: _____ Given names: _____

Address: _____

Suburb: _____ State: _____ Postcode: _____

Telephone: _____ Mobile: _____

Email address: _____ Date of birth: _____ / _____ / _____

Have you informed your attorney that he/she is your attorney and that the POA is stored in Will Safe? Yes No

If you have answered 'No', please ensure that you do inform your attorney that your POA is stored in our Will Safe.

Enduring Guardianship (EG) details (cross out this section if not applicable)

Is this your current EG? Yes No Date of EG: _____ / _____ / _____ No. of pages: _____

Guardian details

Mr Mrs Ms Miss Dr Other _____ (please specify)

Surname: _____ Given names: _____

Address: _____

Suburb: _____ State: _____ Postcode: _____

Telephone: _____ Mobile: _____

Email address: _____ Date of birth: _____ / _____ / _____

Further/alternative guardian (if applicable)

Mr Mrs Ms Miss Dr Other _____ (please specify)

Surname: _____ Given names: _____

Address: _____

Suburb: _____ State: _____ Postcode: _____

Telephone: _____ Mobile: _____

Email address: _____ Date of birth: _____ / _____ / _____

Have you informed your guardian that he/she is your guardian and that the EG is stored in Will Safe? Yes No

If you have answered 'No', please ensure that you do inform your guardian that your EG is stored in our Will Safe.

Is an Advance Care Plan/Directive attached to your EG? Yes No

If so, is it the original document or a copy? Yes No

Is this your current Advance Care Plan/Directive? Yes No Date: _____ / _____ / _____ No. of pages: _____

Deposit declaration

By signing this document:

1. I acknowledge that:

- By accepting my Will and/or POA and/or EG for storage NSW Trustee & Guardian does not check or express any opinion as to their wording or validity.
- It is my responsibility to keep my Will and/or POA and/or EG and the contact details I provide up to date if my circumstances change.
- I am depositing my original Will and/or POA and/or EG, which are dated, signed and witnessed and contain the number of pages set out above.
- NSW Trustee & Guardian has no obligation to monitor death notices or any other information source providing notification of my death.
- It is my responsibility and not that of NSW Trustee & Guardian to:
 - advise my executor of their appointment to this role by me in my Will
 - advise NSW Trustee & Guardian of any changes to my executor's address.
- Whilst NSW Trustee & Guardian will endeavour to take reasonable steps in each case, in the event that NSW Trustee & Guardian is notified of my death, loss of capacity or other circumstance (as the case may be), I release it from liability for loss by any person arising from its failure to notify, in a timely way or at all, the person(s), or the appropriate person(s), appointed to act under my Will and/or POA and/or EG (as the case required) of such circumstances.
- Where I give to NSW Trustee & Guardian in, or in conjunction with this form, personal information of any other individual, I have made or will make the individual aware of NSW Trustee & Guardian's Privacy Policy Statement.

2. I consent to NSW Trustee & Guardian:

- Scanning and keeping an electronic copy of the document(s), so that a copy can be recovered in the unlikely event of a loss.
- Using the personal information I provide in data matching so that my personal situation can be confirmed and, where appropriate, the executor/ or attorney/ or guardian contacted or confirmed.

- Releasing the original documents as follows and (subject to any requirements under law) only as follows:
 - a) To me, or to a person authorised in writing by me to collect the document(s);
 - b) To a person or persons who give NSW Trustee & Guardian evidence that satisfies NSW Trustee & Guardian that he/she/they or it are entitled to commence to act under or in respect of the document as:
 - i. In the case of a Will: the executor or co-executor, or applicant for Letters of Administration with the Will annexed;
 - ii. In the case of POA: the attorney (whether original or, if applicable, the alternative);
 - iii. In the case of EG: the guardian (whether original or, if applicable, the alternative).
- Destroying my Will and/or POA and/or EG when advised in writing by me that the Will and/or POA and/or EG has been revoked; or when advised of my death in writing by the executor of my Will in respect of which probate has been granted.

May we contact you with information that may further assist you with the services provided by NSW Trustee and Guardian?

Yes No

To obtain more information about how we manage your personal information, or if you would like a copy of our Privacy Policy or a form requesting access, please call **1300 10 20 30** (overseas +61 2 9252 0523). You can also obtain our Privacy Policy online at www.tag.nsw.gov.au

Your signature: _____

Date: _____

Office use only

Deposit date: _____

Officer: _____

Location: _____

TEAMS ID: _____

Proof of identity? Yes No

Type: _____ e.g. driver's licence



NSW Trustee & Guardian

1300 10 20 30 | www.tag.nsw.gov.au

Please note: The fees outlined in this brochure are current at the time of publication. For any changes to the fees charged by NSW Trustee & Guardian the information will be made available via our website www.tag.nsw.gov.au

Q My Will and Power of Attorney documents are stored with my solicitor or in a safety deposit box with my bank. Why should I consider Will Safe?

A safety deposit box usually has an annual fee. Will Safe is a low cost alternative with no ongoing costs.

Q I don't want my family or executor to see my Will. Is Will Safe a good option for me?

Yes. Unless required by law, while you are alive we won't allow anyone, apart from you (or someone authorised by you) to access your Will. After your death, your executor will be able to access it and there are certain other people who may be entitled to inspect or obtain a copy of your Will after your death.

Q What happens if I move or live outside of NSW?

Will Safe is only available to NSW residents. If you live outside of NSW please contact your local public trustee office. However, if you previously deposited your Will with NSW Trustee & Guardian you can continue to use this service. Let us know your new contact details. We will continue to hold your Will at no additional cost.

Q How do I retrieve my document once I have deposited it?

Call us to arrange an appointment at one of our branches on 1300 10 20 30 and we will retrieve your document. Please allow five business days notice to ensure we have enough time to deliver your Will to your nominated branch prior to your appointment. Please bring a form of current identification (e.g. passport, driver's licence, pension card, or health card) to your appointment.

Q Do I have to pay a fee if I change my Will, Power of Attorney or Enduring Guardianship documents or write a new one?

Yes. We have kept our fees as low as possible and our fee structure simple. If you retrieve your original Will or Power of Attorney and need to deposit it again or replace it with a new one, you will pay a \$29 fee (GST inclusive). This low fee covers administration, transport and storage costs.

Q Can someone else deposit a Will, Power of Attorney or Enduring Guardianship, on my behalf?

No. You will need to attend in person so that we can verify your identity and so you can sign the deposit form.

Q Who should I notify once I have stored my documents?

Be sure to let your executor know where your Will is stored. Similarly, let your attorney know where your Power of Attorney is stored and your guardian know where your Enduring Guardianship is stored.

Q How will my executor access my Will once I die?

Your executor will need to contact NSW Trustee & Guardian. They will need to bring a copy of the Death Certificate and an original identification document to the appointment.

Q How do I pay?

Fees can only be paid by EFTPOS, Visa or Mastercard at the time you deposit your documents (no cash, cheque, American Express or Diners Club cards are accepted).

