

DOCUMENT RELEASE REQUEST ESTATE PLANNING DOCUMENTS

PERSONAL DETAILS

Title Given names

Surname

Street address Suburb State Postcode

Phone (mobile) Phone (home)

Email address Date of birth / /

REQUEST FOR DOCUMENTS

All of my estate planning documents being held by Equity Trustees (incorporating AET)

OR			
Will dated	/	/	(if known)
Enduring Power of Attorney dated	/	/	(if known)
Advance Health Directive/Personal plan dated	/	/	(if known)
Appointment of Enduring Guardian/Enduring Power of Guardianship dated	/	/	(if known)
Appointment of Medical Decision Maker/Enduring Power of Attorney (Medical) dated	/	/	(if known)
Letter of Wishes dated	/	/	(if known)
Other (please state)			

Reason for document request:

These documents are now revoked

I would like to store the originals elsewhere

I need further copies for my records

More details, if needed

DELIVERY

Please send:

A copy

OR

The originals

of the above documents to:

My address as above

My email address as above

My lawyer or other representative at the following address:

Street address

Suburb

State

Postcode

Marked for the attention of

SIGNATURE

Please note that we are unable to accept digital signatures, please print and sign this form before scanning or posting back to us.

Signature

Date

/ /

At Equity Trustees, we take the safeguarding of your documents seriously, which is why we ask to see your ID before we release them. Please provide a copy of your ID (ie driver's license or passport) when submitting this form.

Please return this form to us along with a copy of ID by:

Email: documentrelease@eqt.com.au

Mail: Equity Trustees
Att: Estate Planning Document Release Team
GPO Box 546, Adelaide SA 5001

PRIVACY

EQT Legal Services Pty Ltd seeks to maintain the accuracy of the personal information it holds to assist us in providing our services. This information is handled in accordance with our Privacy Statement in order to protect your personal information.

You can view our Privacy Statement on our website: www.eqt.com.au/global/privacystatement