

Step-by-step guide
to getting your free
Will.



TE OPE KĀTUA O AOTEAROA
DEFENCE FORCE

Aon

Thanks to Aon, you and your spouse/partner have access to a **FREE Will It package** with Footprint.

Package Details:

Member's of the Defence Force:

- Your Will It package is completely covered.

Your spouse/partner:

- The Will It package is subsidised for the first 12-months.
- Upon renewal, they can continue with the package at their own cost, or cancel and take their Will with them.

Accessing your free Will package in 4 easy steps:

NZDF Members

- 1 Go to:
<https://www.myfootprint.co.nz/org/nzdf-members>
- 2 Complete the form with your details and **continue**
- 3 Choose a password and activate your account
- 4 Once you land on your dashboard, click on **'get started'** to create your Will & answer 6 easy questions.

Spouse/Partner

- 1 Go to:
<https://www.myfootprint.co.nz/org/nzdf-spouse-partner>
- 2 Complete the form with your details and continue
- 3 Enter your password, answer 6 easy questions and activate your account
- 4 Once you land on your dashboard, click on **'get started'** to create your Will

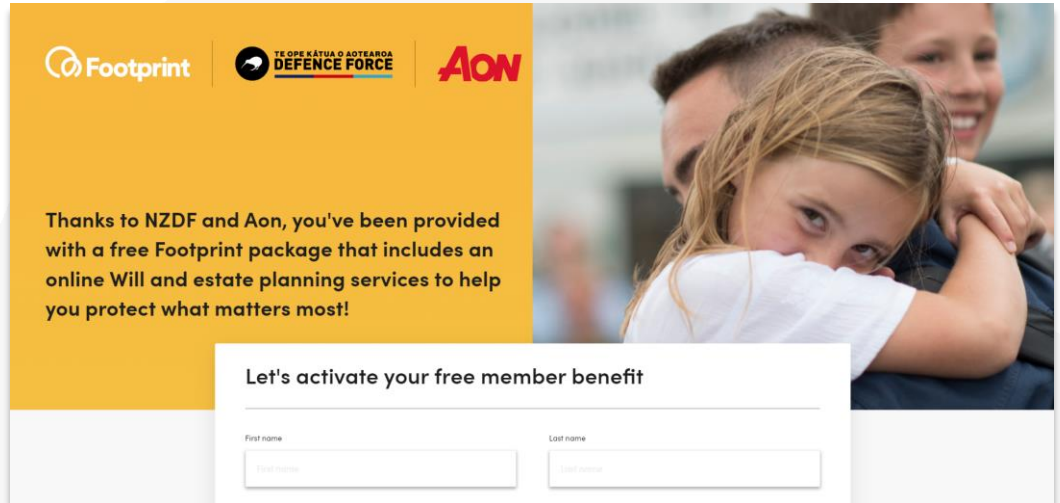
For a more detailed step-by-step member instructions, continue to the next slides



Step 1: Go to the NZDF member offer page

To access the offer go to
<https://www.myfootprint.co.nz/org/nzdf-members>

Note: You can choose to set up your account now and create your Will later on.



Footprint | TE OPE KĀTUA O AOTEAROA DEFENCE FORCE | AON

Thanks to NZDF and Aon, you've been provided with a free Footprint package that includes an online Will and estate planning services to help you protect what matters most!

Let's activate your free member benefit

First name

Last name

Full T&C's can be found [here](#).

Step 2: Complete offer form

Complete the offer form with your details, accept the declaration and **continue**

Note: If you already have a Footprint account, you can log in from this page by clicking the 'Login here' link at the bottom of the form

Let's activate your free member benefit

First name

Last name

Personal email

Service #

Date of birth

Day ▼

Month ▼

Year ▼

I confirm I am a current member of the New Zealand Defence Force.

Continue

Already have a Footprint account? [Login here](#)

If you have already signed up, but not finished the account set up process, you can continue by clicking the link in any of the reminder emails you have received from Footprint or reach out to us for assistance: info@myfootprint.co.nz or 0800 366 877.

Step 3: Activate your account

Choose a password, accept the terms & conditions and **continue** to activate your account

Note: If you have an existing Footprint account and you would like to merge it with this offer, you can do so by clicking 'Existing customer login'

Set Your Password

testemail@myfootprint.co.nz [Edit](#)

Our platform utilises leading security methods for your protection

Password



Confirm password



I agree to the [terms & conditions](#)

[Existing customer login](#)

Continue

Step 4: Create your Will

Now that you're all set up, click on **'get started'** whenever you're ready to create your Will & answer 6 easy questions to make sure a Footprint Will is right for you – it should only take about 15 minutes to complete.

Happy Will writing! 😊



For a detailed step-by-step guide to the 6 questions, continue to the next slides



Family Trust

This question is referring to whether you are the creator of a family trust, vs if your family created one. If you have created one, answer **yes**, but if you don't have one or only belong to one select **no**.

Note: If you answer yes here, you'll be referred to Perpetual Guardian for a consultation.

Thanks! Now lets get your Will sorted

Do you have a Family Trust?

Yes

No

Gifting a business

This question relates to private or public limited companies only.

Question 2 of 6

Do you intend to gift a business to someone in your Will?

This relates to private or public limited companies

Yes

No

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Note: If you answer yes here, you'll be referred to Perpetual Guardian for a consultation.

Beneficiaries with special circumstances

If you are planning on leaving money to someone who can not manage their own finances, there are certain procedures you can put in place to ensure the funds are protected. If this is the case select **yes**.

Note: If you answer yes here, you'll be referred to Perpetual Guardian for a consultation.

Question 3 of 6

**Do any of your beneficiaries
(older than 18 years) have
special circumstances which
means they can't manage
their own finances?**

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Yes

No

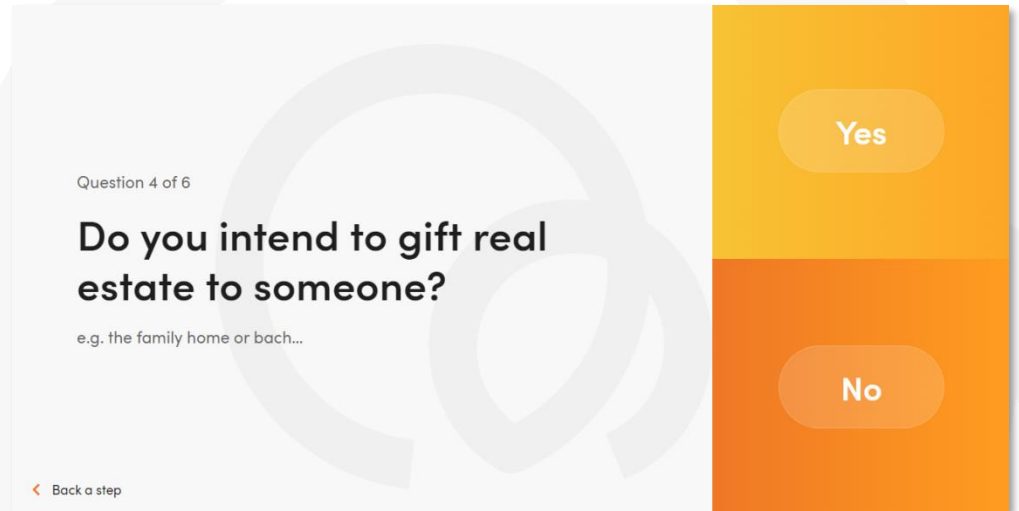
Gifting real estate

First you'll want to know how your property is owned.

If it's jointly owned you won't be able to gift it to someone else, it will automatically go to the other person named on the property. If you understand and have no further questions then click **no** and continue.

However, if the property is owned in your name only or you own shares then you are able to gift it to whomever you please. If you understand that and have no further questions then click **no** to continue.

Note: If you're unsure of the title of your property we'll recommend you get a title search done which you can do here: www.searchthetitle.co.nz.



Question 4 of 6

Do you intend to gift real estate to someone?

e.g. the family home or bach...

Yes

No

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Children

New Zealand legislation favours parents leaving assets equally to all their children (regardless of their circumstance). Any Will that specifies something different to this is more vulnerable to a challenge by an aggrieved party.

By clicking **yes** to this question you will be directed to the link below so you are fully aware of all considerations. It will be your choice to move forward with a Will or not. If you are unsure please feel free to contact us.

[The Family Protection Act \(FPA\).](#)

Question 5 of 6

Are you intending to leave any children out of your Will, or divide your assets unequally between your children?

Yes

No

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Partner

If you plan to leave your partner out of your Will, keep in mind they could challenge your Will because it falls under [The Family Protection Act \(FPA\)](#).

Note: A partner is defined as: a “de facto relationship”. This is a relationship between two people, both aged 18 years or older; who “live together as a couple”; and who are not married to, or in a civil union with, each other. The definition is flexible because it relies on a high level of judicial discretion and takes a functional approach that looks at how a couple’s relationship operates in practice rather than its form. To see a full definition [click here](#) and go to page 96.

Question 6 of 6

Are you intending on leaving your partner out of your Will?

Yes

No

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Get in touch

If you have any questions don't hesitate to get in touch with us today someone from Footprint will be there to help!

Send us your original Will for storage:

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PO Box 301637
Albany
Auckland 0752
NEW ZEALAND

Visit: www.myfootprint.co.nz

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