

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



Package Details:

You:

- Your Will It package is completely covered.
- Use the voucher code **AON105**.

Your spouse/partner:

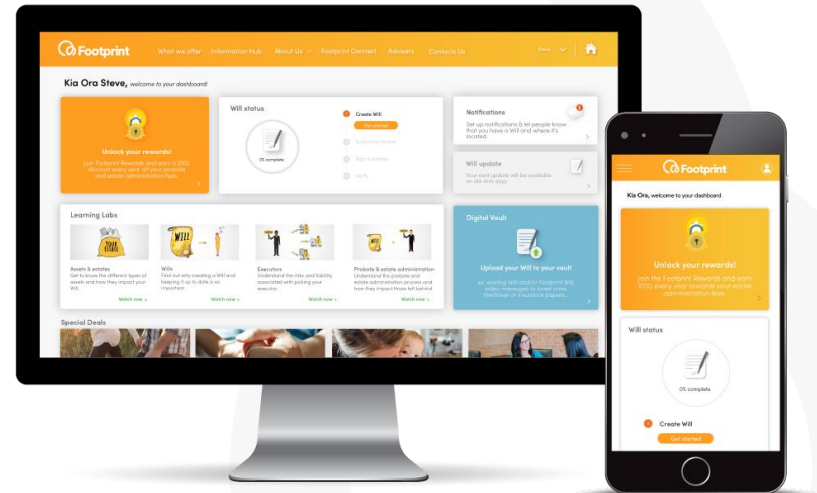
- The Will It package is subsidised for the first 12-months.
- Upon renewal, they can continue with the package at their own cost, or cancel and take their Will with them.
- Use the voucher code **AON105SP**.

A large, bold, red 'AON' logo is centered on the right side of the slide. The letters are thick and stylized, with the 'O' being a solid circle. The logo is set against a background of a large, light grey circular graphic that resembles a stylized 'A' or a similar shape.

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

Accessing your free Will in 4 easy steps:

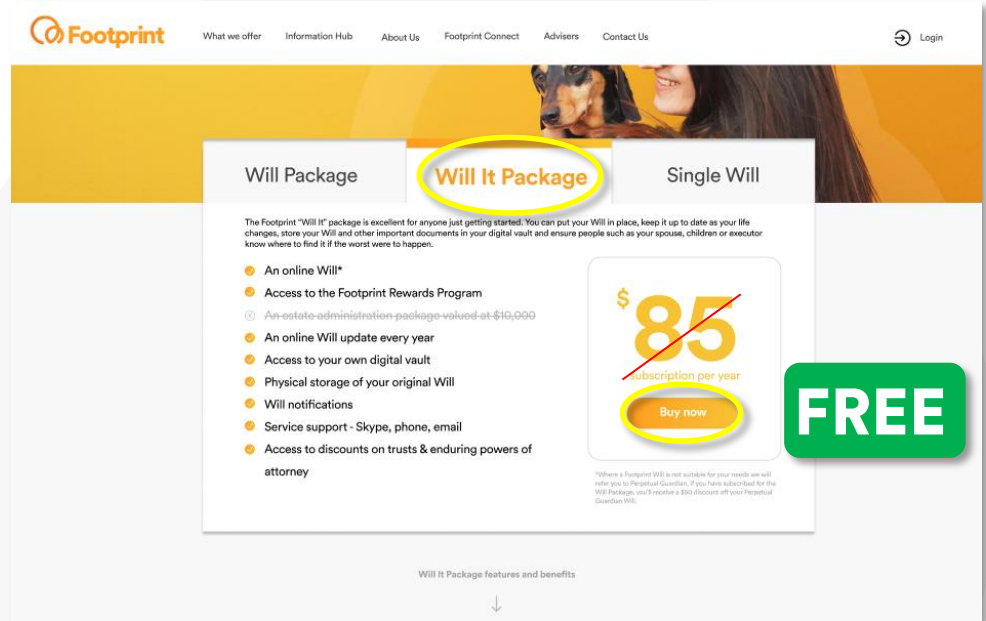
- 1 Go to www.myfootprint.co.nz/will-it-package and select the Will It package.
- 2 Register your account & answer 6 easy questions.
- 3 Enter the voucher code **AON105** (**AON105SP** for your spouse/partner) to bypass the payment.
- 4 Once you land on your dashboard, click on 'get started' to create your Will.



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

Step 1: Choose the Will It package from the Footprint website

To register your free Will It package go to www.myfootprint.co.nz/will-it-package and click 'Buy now'.



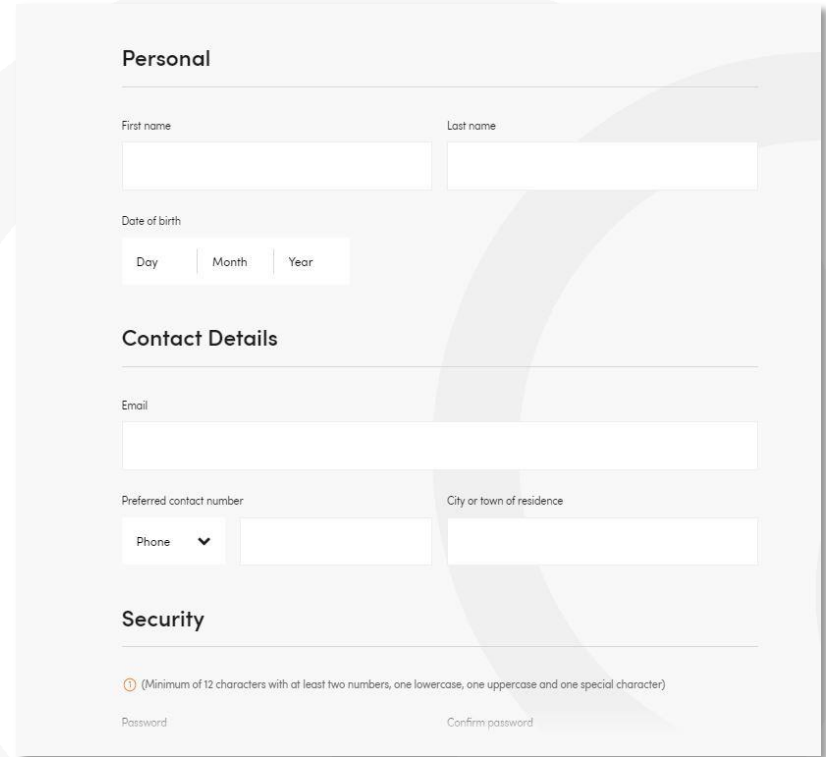
Note: You can choose to register your account now and create your Will later on.

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

Step 2: Register your account & answer a few questions

If you have a spouse/partner or are in a defacto relationship, each person will need to register their own account and create their own Will.

In New Zealand, you can not have a joint Will. However, there is nothing stopping you from creating your Will alongside your partner to help ensure both Wills read the same.



The image shows a registration form with the following sections:

- Personal**
 - First name:
 - Last name:
 - Date of birth: Day | Month | Year
- Contact Details**
 - Email:
 - Preferred contact number: Phone
 - City or town of residence:
- Security**
 - ⓘ (Minimum of 12 characters with at least two numbers, one lowercase, one uppercase and one special character)
 - Password:
 - Confirm password:

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**.

Thanks! Now lets get your Will sorted

Do you have a Family Trust?

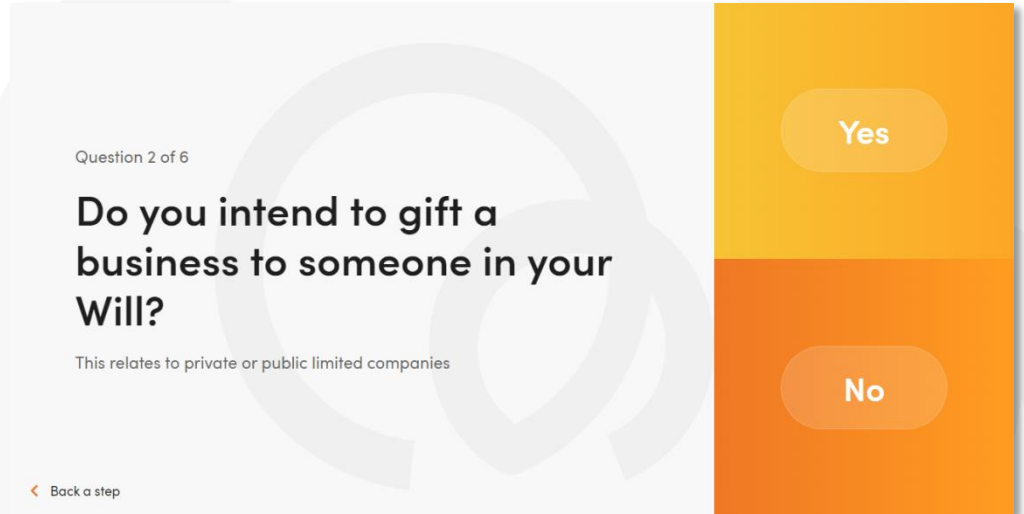
Yes

No

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

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

[Back a step](#)

Yes

No

The screenshot shows a mobile application interface for a questionnaire. It features a white background with a large, faint circular graphic in the background. The question is centered in bold black text. Below the question is a smaller line of text. To the right of the question are two large, rounded rectangular buttons: a yellow one for 'Yes' and an orange one for 'No'. At the bottom left, there is a small link that says 'Back a step' with a left-pointing arrow.

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?

Yes

No

< Back a step

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

< Back a step

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

< Back a step

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?

< Back a step

Yes

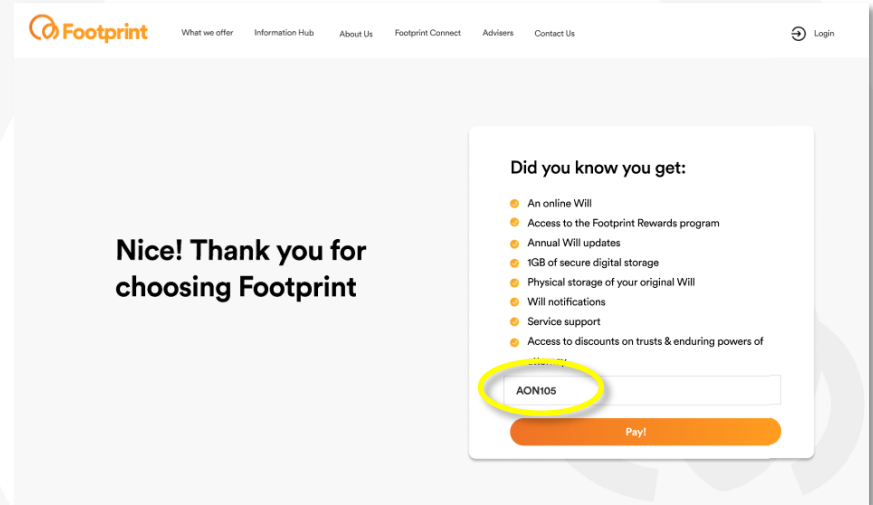
No

Step 3: Enter your voucher

Once that's all done, you'll arrive to the payment screen where you will enter your voucher code **AON105** (or **AON105SP** for your spouse).

Click '**Pay!**' to proceed.

Note: Your spouse also has access to the same benefit for a period of 12 months at no charge. If they want to continue with the package they will need to take over the annual payment upon renewal.



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Nice! Thank you for choosing Footprint

Did you know you get:

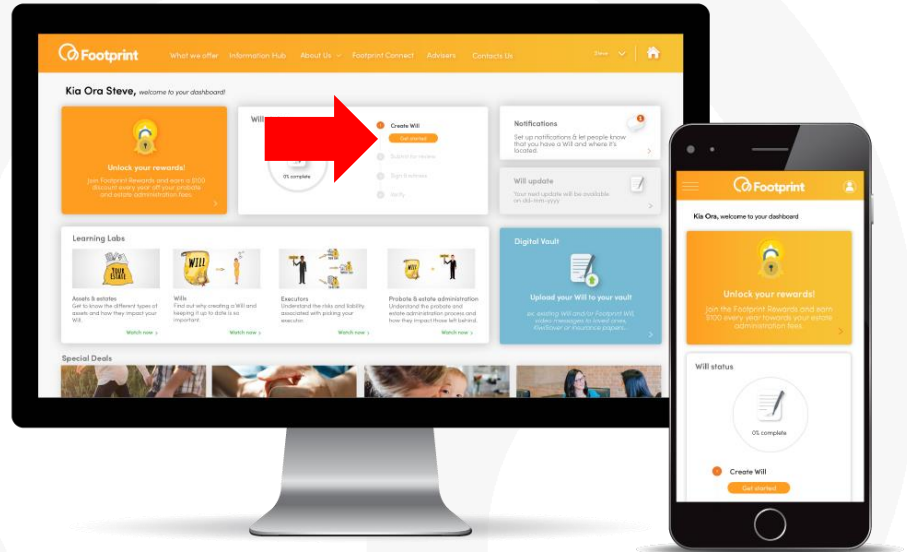
- An online Will
- Access to the Footprint Rewards program
- Annual Will updates
- 1GB of secure digital storage
- Physical storage of your original Will
- Will notifications
- Service support
- Access to discounts on trusts & enduring powers of attorney

Pay!

Step 4: Create your Will

Now that you're all registered click on 'get started' whenever you're ready to create your Will – it should only take about 15 minutes to complete.

Happy Will writing! 😊



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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NEW ZEALAND

Visit: www.myfootprint.co.nz

Email: info@myfootprint.co.nz

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