Footprint Upfront Questions

To ensure that the Footprint product is right for a customers situation, there are upfront questions asked based on their circumstances. We share this information as we feel it is important that they are able to make decisions on how best to manage these. Less than 1% of Footprint's customers require a complex Will.

01 **Do you have a family trust?**
Note: This only applies if they are the ones who set up the trust. If they are a beneficiary of a trust it does not apply.

02 **Do you own a business and do you intend to gift your business to someone other than your main beneficiaries?**

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

If 'yes' to questions 1, 2 or 3, Footprint will ask them to provide their contact number and we'll have a professional Will drafter call them to further understand their situation.

04 **Are you in a blended family with children of your own?**

05 **Do you intend to gift real estate (i.e. the family home or a bach) to someone who is not the main beneficiary?**

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

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

If 'yes' to any of these 4 questions Footprint will share important information that we feel they need to consider before continuing.