



# WILLS AND ESTATE PLANNING **PACKAGES AND PRICES**

Having a comprehensive and up to date estate plan will give you so much certainty and peace of mind knowing your affairs are in order.

**FIXED FEE PRICING MEANS NO BILL SHOCK**



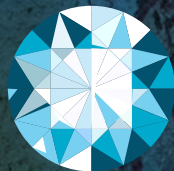
**RAYNERS**  
LAWYERS



## MEET KIRSTY

### **KIRSTY RAYNER, FOUNDER OF RAYNERS LAWYERS**

Kirsty Rayner is a passionate Wills and Estates Lawyer who has undertaken several years of further education and training to obtain her Masters of Law in this specialised field. Kirsty is experienced in preparing sophisticated estate plans for individuals, couples, blended families and high net wealth clients. Kirsty loves helping her clients protect their hard earned assets, reduce tax and limit potential claimants from attacking her client's estates.



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## SIMPLE WILL

*For clients who need a basic will. Popular with individuals and couples who have a small number of assets and beneficiaries that are not at risk of family law breakdown or bankruptcy. This package does not include complex gifting clauses and usually leaves the client's entire estate to their spouse with a substitute gift-over to their children.*

1. Initial estate planning meeting (up to 30 minutes)
2. Preparation of your Simple Will including:
  - a. the appointment of your executor and back-up executor
  - b. the appointment of a testamentary guardian and back-up guardian to look after any minor children
  - c. basic estate planning advice with respect to your beneficiaries, including your spouse, children, grandchildren and others
  - d. advice on a number of possibilities and traps that may arise and circumstances under which you should change your Will
  - e. advice to assist you to avoid intestacy, on whether your Will may result in a claim on your estate and if so what steps you should now take to deal with the possibility of that claim
  - f. disposal of body wishes (if any)
3. Signing meeting / Preparation of signing instructions
4. Certified copy of your Will for you to keep or give to your executor
5. Storage of your original Will in our safe custody facility

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**Individual - \$880 (incl. GST)**

**Couple - \$1,500 (incl. GST)**

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**Find out more with an obligation-free 15 minute discovery call 02 6583 4312**





## SIMPLE ESTATE PLAN

*Appropriate for clients that don't want any loose ends. This package includes a simple Will, Power of Attorney, Enduring Guardianship, Superannuation Binding Death Benefit Nomination and Letter of Wishes*

1. Initial estate planning meeting (up to 45 minutes)
2. Preparation of your simple Will including:
  - a. the appointment of your executor and back-up executor
  - b. the appointment of a testamentary guardian and back-up guardian to look after any minor children
  - c. tailored basic estate planning advice with respect to your beneficiaries, including your spouse, children, grandchildren and others
  - d. advice on a number of possibilities and traps that may arise and circumstances under which you should change your Will
  - e. advice to assist you to avoid intestacy, on whether your Will may result in a claim on your estate and if so what steps you should now take to deal with the possibility of that claim
  - f. disposal of body wishes (if any)
3. Preparation of your Letter of Wishes template
4. Preparation of your Power of Attorney
5. Preparation of your Enduring Guardianship
6. Review and update your superannuation binding death benefit nomination (excludes SMSFs)
7. Signing meeting / Preparation of signing instructions
8. Certified copies of your documents for you to keep or give to your executor, attorney and guardian
9. Storage of your original estate planning documents in our safe custody facility

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**Individual - \$1,100 (incl. GST)**

**Couple - \$1,900 (incl. GST)**

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Find out more with an obligation-free 15 minute discovery

# PREMIUM ESTATE PLAN

*This is the perfect estate plan for clients who want to protect their hard earned assets and save significant amounts of tax. It is appropriate for clients that have minor children (or grandchildren) to stream income through to, blended families and clients that wish to leave someone out of their Will (or are concerned that someone may challenge their Will). This estate plan is also suitable if you have vulnerable beneficiaries that need protection from themselves, creditors, predators or potential family law proceedings.*



1. Initial estate planning meeting (up to 1.5 hours)
2. Preparation of your Will including:
  - a. testamentary discretionary trust provisions
  - b. incorporation of a superannuation proceeds trust to capture any death benefits paid into your estate
  - c. the appointment of your executor/trustee/appointor and back-up executor/trustee/appointor
  - d. the appointment of a testamentary guardian and back-up guardian to look after any minor children
  - e. tailored estate planning advice with respect to your beneficiaries, including your spouse, children, grandchildren and others
  - f. tailored advice in relation to the number of trusts to set up and what assets to put into each trust
  - g. advice in relation to the provisions governing the trust
  - h. advice on a number of possibilities and traps that may arise and circumstances under which you should change your Will
  - i. advice to assist you to avoid intestacy, on whether your Will may result in a claim on your estate and if so what steps you should now take to deal with the possibility of that claim
  - j. disposal of body wishes (if any)
3. Preparation of your Letter of Wishes template
4. Preparation of your Power of Attorney
5. Preparation of your Enduring Guardianship
6. Review and update your superannuation binding death benefit nominations (excludes SMSFs)
7. Pre-signing meeting to review and revise your draft documents
8. Signing meeting / Preparation of signing instructions
9. Certified copies of your documents for you to keep or give to your executor, attorney and guardian
10. Storage of your original estate planning documents in our safe custody facility

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**Individual \$2,200 (incl GST)**  
**Couple \$2,900 (incl GST)**

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# COMPLEX ESTATE PLAN

*Suitable for clients running a business or company and clients with family trusts or self-managed superannuation funds. This package is also suitable for clients with a disabled beneficiary or a beneficiary who is unable to manage their inheritance.*



1. Initial estate planning meeting (up to 1.5 hours)
2. Preparation of your Will including:
  - a. testamentary discretionary trust provisions
  - b. incorporation of a superannuation proceeds trust to capture any death benefits paid into your estate
  - c. the appointment of your executor/trustee/appointor and back-up executor/trustee/appointor
  - d. the appointment of a testamentary guardian and back-up guardian to look after any minor children
  - e. tailored estate planning advice with respect to your beneficiaries, including your spouse, children, grandchildren and others
  - f. tailored advice in relation to the number of trusts to set up and what assets to put into each trust
  - g. advice in relation to the provisions governing the trust
  - h. advice on a number of possibilities and traps that may arise and circumstances under which you should change your Will
  - i. advice to assist you to avoid intestacy, on whether your Will may result in a claim on your estate and if so what steps you should now take to deal with the possibility of that claim
  - j. disposal of body wishes (if any)
3. Preparation of your Letter of Wishes template
4. Preparation of your Power of Attorney
5. Preparation of your Enduring Guardianship
6. Review and update your superannuation binding death benefit nominations (if required)
7. Review documents associated with up to two entities (i.e. company constitution, SMSF deed, family trust deed or partnership agreement) and recommendations for appropriate succession planning (a separate fixed fee proposal will be provided for any structuring changes that are required to be implemented)
8. Collaboration with your accountant and financial advisor
9. Pre-signing meeting to review and revise your draft documents
10. Signing meeting / Preparation of signing instructions
11. Certified copies of your documents for you to keep or give to your executor, attorney and guardian
12. Storage of your original estate planning documents in this firm's safe custody facility

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**Individual \$POA**  
**Couple \$POA**

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## POWER OF ATTORNEY

A Power of Attorney is a very important and powerful legal document that allows someone, known as your attorney, to make financial decisions on your behalf when you're not able to or simply do not want to. You might have lost the capacity to manage your finances through old age, accident or illness. Alternatively, you may simply lead an extremely busy lifestyle and would prefer someone else to manage your financial and legal affairs on your behalf.

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**Individual \$330 incl GST**  
**Couple \$550 incl GST**

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## ENDURING GUARDIANSHIP

Enduring Guardianships are an excellent estate planning tool that sets out your wishes in relation to your health and lifestyle. Your loved ones will benefit immensely from seeing your wishes documented in black and white, particularly if they are forced to make difficult end of life decisions for you. Your family will have peace of mind knowing that they have carried out your wishes in accordance with your own directions.

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**Individual \$330 incl GST**  
**Couple \$550 incl GST**

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### EXCLUSIONS & FINEPRINT

Our Wills and estate planning packages are designed to meet most circumstances. However, if we identify that your circumstances require more than what is included in our standard estate planning packages (e.g. you would like to incorporate a life estate into your Will, you need to change the way you own a property with someone (e.g. convert the ownership structure from joint tenants to tenants in common), there are concerns about your capacity to make a Will or enduring document or you require an interpreter,) we will provide you with a tailored fixed fee proposal. All prices are valid for 90 days.

### INITIAL ESTATE PLANNING STRATEGY MEETING \$295 PLUS GST

*(Deducted from the price of your nominated package)*

A meeting to discuss your unique circumstances and wishes with respect to your estate plan. We will review your completed questionnaire and answer any questions you have.

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