

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
11. Storage of your original estate planning documents in our safe custody facility

Individual \$2,200 (incl GST)

Couple \$2,900 (incl GST)

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