

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