



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

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

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

Find out more with an obligation-free 15 minute discovery