

# BLENDING FAMILY ESTATE PLAN

*A bespoke Will personalised to suit your family's unique dynamic. A combination of the below options may be adopted depending on your assets and your level of risk.*



1. Initial estate planning meeting (45 minutes)
2. Preparation of your bespoke Will
3. Preparation of your personal Power of Attorney
4. Preparation of your Enduring Guardianship
5. Complimentary Letter of Wishes Workbook and Digital Assets Workbook
6. Review of your superannuation binding death benefit nominations
7. Preparation of a Mutual Will Contract
8. Preparation of Life Estate provisions
9. Preparation of a section 100 statutory declaration
10. Collaboration with your accountant and financial advisor
11. Signing meeting / Preparation of signing instructions
12. Annual Review Checklist
13. Complimentary 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