COMPLEX ESTATE PLAN

Suitable for clients who wish to leave someone out of their Will (or are concerned that someone may challenge their Will). 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. A combination of the below options may be packaged together.

1. Initial estate planning meeting
2. Preparation of your bespoke Will
3. Preparation of your personal Power of Attorney
4. Preparation of a Corporate Power of Attorney
5. Preparation of your Enduring Guardianship
6. Complimentary Letter of Wishes Workbook and Digital Assets Workbook
7. Review of your superannuation binding death benefit nominations
8. Review corporate documents (i.e. company constitution, SMSF deed, family trust deed or partnership agreement) and provide recommendations for appropriate succession planning (a separate fixed fee proposal will be provided for any structuring changes that are required to be implemented)
9. Preparation of Life Estate provisions
10. Preparation of a section 100 statutory declaration
11. Collaboration with your accountant and financial advisor
12. Signing meeting / Preparation of signing instructions
13. Annual Review Checklist
14. 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