



# WILLS AND ESTATE PLANNING **PACKAGES AND PRICES**

Having a comprehensive and up to date estate plan will give you so much certainty and peace of mind knowing your affairs are in order.



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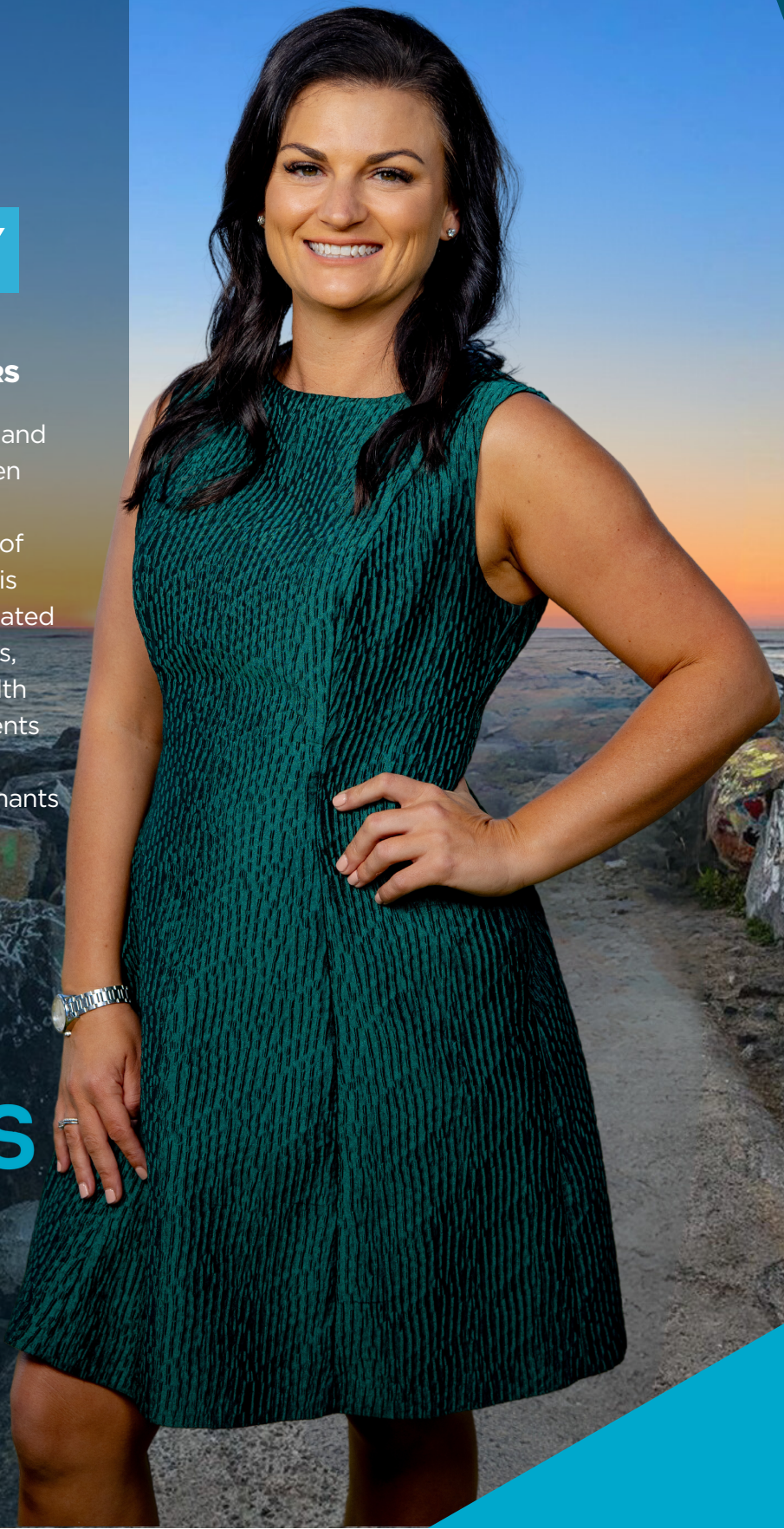
## MEET KIRSTY

### **KIRSTY RAYNER, FOUNDER OF RAYNERS LAWYERS**

Kirsty Rayner is a passionate Wills and Estates Lawyer who has undertaken several years of further education and training to obtain her Masters of Law in this specialised field. Kirsty is experienced in preparing sophisticated estate plans for individuals, couples, blended families and high net wealth clients. Kirsty loves helping her clients protect their hard earned assets, reduce tax and limit potential claimants from attacking her client's estates.



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## STANDARD WILL

*For clients who need a standard Will. Popular with individuals and couples who have a small number of assets. This package does not include complex gifting clauses and is suitable for clients who wish to nominate one or two beneficiaries equally only.*

1. Initial estate planning meeting
2. Preparation of your standard 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. standard 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. disposal of body wishes (if any)
3. Complimentary signing meeting / preparation of signing instructions
4. Complimentary review of your superannuation binding death benefit nomination
5. Complimentary storage of your original Will in our safe custody facility
6. Complimentary annual review checklist

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**Individual - \$550 incl GST**  
**Couple - \$990 incl GST**

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



## STANDARD ESTATE PLAN

1. Initial estate planning meeting
2. Preparation of your standard 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 Power of Attorney
4. Preparation of your Enduring Guardianship
5. Complimentary Letter of Wishes template
6. Complimentary review of your superannuation binding death benefit nomination (excludes SMSFs)
7. Complimentary signing meeting / preparation of signing instructions
8. Complimentary certified copies of your incapacity documents when required
9. Complimentary storage of your original estate planning documents in our safe custody facility
10. Complimentary annual review checklist

*Appropriate for clients who don't want any loose ends. This package includes a standard Will, Power of Attorney, Enduring Guardianship, Superannuation Binding Death Benefit Nomination Review and a Letter of Wishes template*

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**Individual - \$1,200 incl GST**  
**Couple - \$2,200 incl GST**

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# PREMIUM ESTATE PLAN

*This is the perfect estate plan for clients who want to protect their assets and save significant amounts of tax.*

*It is appropriate for clients that have minor children (or grandchildren) to stream income through to. 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
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 Power of Attorney
4. Preparation of your Enduring Guardianship
5. Complimentary Letter of Wishes Workbook
6. Complimentary review /update of your superannuation binding death benefit nominations (excludes SMSFs)
7. Complimentary signing meeting / preparation of signing instructions
8. Complimentary certified copies of your incapacity documents if they are required to be used
9. Complimentary storage of your original estate planning documents in our safe custody facility

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**Individual \$2,200 incl GST**  
**Couple \$3,300 incl GST**

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# 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
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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# 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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## POWER OF ATTORNEY

A Power of Attorney is a very important and powerful legal document that allows someone, known as your attorney, to make financial decisions on your behalf when you're not able to or simply do not want to. You might have lost the capacity to manage your finances through old age, accident or illness. Alternatively, you may simply lead an extremely busy lifestyle and would prefer someone else to manage your financial and legal affairs on your behalf.

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**Individual \$350 incl GST**

**Couple \$660 incl GST**

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## ENDURING GUARDIANSHIP

Enduring Guardianships are an excellent estate planning tool that sets out your wishes in relation to your health and lifestyle. Your loved ones will benefit immensely from seeing your wishes documented in black and white, particularly if they are forced to make difficult end of life decisions for you. Your family will have peace of mind knowing that they have carried out your wishes in accordance with your own directions.

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**Individual \$350 incl GST**

**Couple \$660 incl GST**

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## EXCLUSIONS & TERMS & CONDITIONS

Our standard Wills and estate planning packages are designed to leave your entire estate to a beneficiary with a single giftover clause to back-up beneficiaries in equal shares. If we identify that your circumstances are outside our 'standard' scope, we will provide you with a tailored fixed fee proposal. Common exclusions include the following complex clauses and structures. Prices below are estimates only.

- You want to leave real estate to one person but allow someone else to live in the property until they die/re-partner/move out: \$440 incl GST
- You want to prepare a Mutual Will Contract to prevent your partner from ever changing their Will: \$660 incl GST
- You wish to make more than one specific gift, for example multiple gifts of jewellery, motor vehicles, cash etc: \$110 incl GST per additional gift
- You would like to prepare a section 100 statutory declaration explaining your reasons for making no provision, or unequal provision for certain beneficiaries: \$550 incl GST per hour (usually 1 hour to prepare)
- You need to change the way you own a property with someone (e.g. convert the ownership structure from joint tenants to tenants in common): \$1,200 incl GST plus disbursements
- There are concerns about your capacity to make a Will or enduring document and we are required to prepare a letter to your usual treating GP or specialist doctor requesting a report documenting your testamentary capacity: \$110 incl GST
- You require a solicitor to attend your home or hospital: travel fee \$110 incl GST per round trip within 20km radius of our Port Macquarie office location
- You fail to sign your documents in a timely manner and we are forced to chase you and issue reminders: \$110 incl GST per follow up telephone attendance or correspondence

Our fixed fees are subject to change and are valid for 2 months.

## INITIAL STRATEGY MEETING

***(Deducted from the price of your nominated package if you proceed)***

Book a 30 minute strategy meeting for assistance with:

- estate planning strategy options;
- an estate that you are beneficiary or executor of.

You will be invoiced \$275 incl GST which will be invoiced and payable at the end of the meeting.

If the meeting exceeds 30 minutes we will invoice you at the rate of \$550 incl GST per hour or part-thereof. This meeting may require us to prepare by reading existing documents including Wills, trust deeds, SMSF deeds and company constitutions. We will let you know if we require time to prepare for the meeting and the associated cost in advance of the meeting.

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# RAYNERS

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