



## 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 other loved ones
  - 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 Workbook
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 Workbook***

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**Individual - \$1,750 incl GST**

**Couple - \$2,990 incl GST**

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