



## SIMPLE WILL

*For clients who need a basic will. Popular with individuals and couples who have a small number of assets and beneficiaries that are not at risk of family law breakdown or bankruptcy. This package does not include complex gifting clauses and usually leaves the client's entire estate to their spouse with a substitute gift-over to their children.*

1. Initial estate planning meeting (up to 30 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. 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. Signing meeting / Preparation of signing instructions
4. Certified copy of your Will for you to keep or give to your executor
5. Storage of your original Will in our safe custody facility

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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 1800 568 884**