



Estate Planning GUIDELINES

GENERAL CHECKLIST ITEMS

- | | YES | NO |
|--|--------------------------|--------------------------|
| Do you have a current Will? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have a current Power of Attorney? | <input type="checkbox"/> | <input type="checkbox"/> |

FUNDING

- | | | |
|--|--------------------------|--------------------------|
| Do you have sufficient funds or assets available to pay off debts after death? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have sufficient funds or assets for loved ones and dependants? | <input type="checkbox"/> | <input type="checkbox"/> |

ESTATE PLANNING

- | | | |
|---|--------------------------|--------------------------|
| Is your spouse/partner and children provided for in your Estate Plan? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have a blended family or other family members you wish to include? | <input type="checkbox"/> | <input type="checkbox"/> |
| Would you like to restrict access to an inheritance until a certain age? | <input type="checkbox"/> | <input type="checkbox"/> |
| Consideration for beneficiaries with a special need or disability? | <input type="checkbox"/> | <input type="checkbox"/> |
| Including education for your children? | <input type="checkbox"/> | <input type="checkbox"/> |
| Including education for your grandchildren? | <input type="checkbox"/> | <input type="checkbox"/> |
| Would you like to include a charity or not-for-profit organisation? | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you considered the guardians of your children? | <input type="checkbox"/> | <input type="checkbox"/> |

Estate Planning GUIDELINES



PROTECTION FOR YOUR ESTATE

YES NO

- | | | |
|--|--------------------------|--------------------------|
| Are there any changes to be made to your Will? | <input type="checkbox"/> | <input type="checkbox"/> |
| Could your Superannuation Death Benefits be challenged? | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you considered protection for the breakdown risk to beneficiary relationships or divorce? | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you considered business risk protection for beneficiaries? | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you considered bankruptcy risk protection for beneficiaries? | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you considered spendthrift or addiction issue protection? | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you considered protection for other beneficiary vulnerabilities? | <input type="checkbox"/> | <input type="checkbox"/> |

SUPERANNUATION

YES NO

- | | | |
|---|--------------------------|--------------------------|
| Do you understand what happens to your superannuation when you pass? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need to update beneficiary nomination for superannuation benefits? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need to update your Self Managed Superannuation Fund deed? | <input type="checkbox"/> | <input type="checkbox"/> |
| What happens to trustee succession in the case of death or incapacity? | <input type="checkbox"/> | <input type="checkbox"/> |

ASSET PROTECTION

YES NO

- | | | |
|---|--------------------------|--------------------------|
| Do you have appropriate legal structures for the ownership of assets? | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you considered your personal business risk? | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you considered your personal asset protection against other risks? | <input type="checkbox"/> | <input type="checkbox"/> |

BUSINESS

YES NO

- | | | |
|---|--------------------------|--------------------------|
| Do you have arrangements for business succession? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have Family Trust documents to confer control and succession effective on death? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have company succession and ownership documents effective on death? | <input type="checkbox"/> | <input type="checkbox"/> |