connollysuthers LAWYERS

Estate Planning
WHAT WE NEED FROM YOU

Here is a list of things we need from you to properly look after your interests when advising you about your Estate Planning.

Some of the things below may not be relevant to you.

THE DOCUMENTS

Where applicable, your current:-

1. Will;
2. Enduring Power of Attorney;
3. Family Discretionary Trust Trust Deed;
4. Partnership Agreement;
5. Company Constitution;
6. Superannuation Member Benefit Statement;
7. Superannuation Binding Death Benefit Nomination;
8. SMSF Trust Deed;
9. Superannuation Pension Documents;
10. Policy Schedule for any life insurance you have.

THE FINANCIALS

Where applicable, the current Financial Statements (i.e. Balance Sheets) for your:-

1. Family Discretionary Trust;
2. Partnership;
3. Company;
4. SMSF

A Statement of Assets and Liabilities for land and buildings, personal property and bank accounts etc:-

1. you own individually;
2. you own jointly with another;
3. owned by a Family Discretionary Trust, Partnership, Company or SMSF;

THE PEOPLE

Where applicable, please advise us the full names and dates of birth of your:-

1. Executors;
2. Alternative Executors (i.e. the back-up Executors);
3. Spouse (and any former spouse) de-facto or otherwise;
4. Children (including biological, adopted, step and foster);
5. Grandchildren;
6. Financial Dependants (if they are not included in 1 to 5 above);

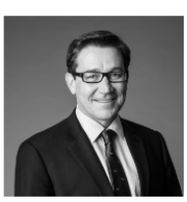
YOUR WISHES

Please advise us:-

1. who you wish to benefit from your estate
2. do any of your beneficiaries have any capacity issues or physical disabilities?
3. could any of your beneficiaries become involved in Family Court Property Proceedings?
4. could any of your beneficiaries become bankrupt or have problems with creditors?
5. do any of your beneficiaries (or their partners) have drug, alcohol or gambling issues?
6. do any of your beneficiaries receive a Centrelink pension?
7. is securing your wealth for the benefit of your spouse, your children and their children important to you?

Talk to our professionals

(07) 4771 5664 law@connollysuthers.com.au



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