

ESTATE PLANNING

Information/Documents Checklist

To allow your instructions to be taken efficiently and enable us to assist you in the most appropriate way, where possible it would be useful for the following information and/or documents to be available at your first meeting with us:

1. A copy of any of your existing or previous Wills and Enduring Powers of Attorney;
2. A list of assets which you own or control;
3. A list of your liabilities;
4. Details of your family members and other dependants, including full names, addresses and dates of birth;
5. Details of proposed beneficiaries, including full names, addresses and dates of birth;
6. Names and contact details of your Accountant/Financial Advisor/Superannuation Advisor;
7. Details of proposed executors;
8. Details of proposed guardians;
9. Details of your life insurance (please bring a copy of your last statement if possible);
10. Details of your superannuation entitlements including any nominated beneficiary (please also bring a copy of your most recent benefits statement or where your entitlements are in a self-managed superannuation fund (SMSF), a copy of the SMSF deed, the most recent financial statements and a copy of any binding or non-binding death benefit nomination previously made by you);
11. Details of any family or private company in which you are a shareholder or officer (please also bring a copy of the company constitution, the latest ASIC annual return and financial statements);
12. Details of any family trusts (including a copy of the trust deed, any deeds of variation and the most recent financial statements); and
13. Details of any partnership in which you are engaged (including a copy of any partnership deed and the most recent financial statements).

This publication is for information only and is not legal advice. You should obtain advice that is specific to your circumstances and not rely on this publication as legal advice. If there are any issues you would like us to advise you on arising from this publication, please let us know.