

## ESTATE PLANNING

### Your Appointment at Bell Legal Group

We confirm your appointment to meet with a member of our experienced Estate Planning and Asset Protection team.

Our office is located at Level 4, 91 Upton Street, Bundall, Queensland. Parking is available for your convenience outside our office on Upton Street. Please note that parking available on the eastern side of the street is "paid" parking.

#### What should you bring with you?

To allow us to take your instructions efficiently and assist you in the most appropriate way, where possible it would be useful (but not essential) 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 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, address 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).

## What happens after the first meeting?

At the conclusion of our meeting, or shortly thereafter, you will be provided with an estimate of our professional fees to assist in your estate planning. Where possible, this will be a fixed fee amount. You may also need to sign a Costs Agreement before we commence work on your matter and/or proceed with drafting documents.

In the event that you elect not to proceed further following the initial consultation, then you may be charged an initial consultation fee on the following basis:

	Fee for ½ to 1 hour consultation (inc GST)
Junior Solicitor	\$302.50
Paralegal/Law clerk	\$330.00
Solicitor	\$357.50
Senior Solicitor/Manager	\$385.00
Associate/Associate Consultant	\$412.50
Senior Associate	\$440.00
Partner/Team Leader	\$484.00

We will discuss this further with you at our first meeting.

*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.*