

ESTATE PLANNING

When your Will and Estate Plan may not be 'simple'

Every Will is different, ranging from those that are very basic and straightforward to those that are quite complex. Bell Legal Group are experienced at preparing Wills across a range of complexities. However, sometimes what you might consider a 'simple' Will may in fact be much more complex.

If any of the following factors apply to your circumstances, it is unlikely that your estate planning is a 'simple' situation:

1. You have been married previously or have children to a prior relationship;
2. You wish to exclude a potential beneficiary from your Will;
3. You wish to include:
 - (a) a life interest or right to reside in a property;
 - (b) various specific gifts;
 - (c) one or more charities as beneficiaries;
 - (d) beneficiaries who are non-resident of Australia;
4. You have:
 - (a) a family trust or other trust structure;
 - (b) company or business interests;
 - (c) a self-managed superannuation fund;
 - (d) property outside Australia.

If any of these factors apply to you, your estate planning is likely to be more complex. This means that our fees for advising you and preparing your estate planning documents will be more than for a simple Will. We will confirm our fees with you once we have all relevant information from you.

If you have any questions, please contact our experienced estate planning team for more information.

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.