

WILLS AND ESTATE PLANNING HEALTH CHECK

We're here to help you make sure
your estate plan is up to date and
fit for purpose.



Here's a list of documents you need to prepare to put your affairs in order

Need	Done
<input type="checkbox"/>	<input type="checkbox"/> Family tree
<input type="checkbox"/>	<input type="checkbox"/> List of assets and liabilities
<input type="checkbox"/>	<input type="checkbox"/> Superannuation statements, SMSF trust deed (if applicable) and family trust deed (if applicable)
<input type="checkbox"/>	<input type="checkbox"/> Insurances – life and TPD
<input type="checkbox"/>	<input type="checkbox"/> Consider executors
<input type="checkbox"/>	<input type="checkbox"/> Consider guardians for your children
<input type="checkbox"/>	<input type="checkbox"/> Last Will and Testament
<input type="checkbox"/>	<input type="checkbox"/> Mutual Will Agreement
<input type="checkbox"/>	<input type="checkbox"/> Consider a testamentary trust
<input type="checkbox"/>	<input type="checkbox"/> Enduring Power of Attorney
<input type="checkbox"/>	<input type="checkbox"/> Appointment of a Medical Treatment Decision Maker
<input type="checkbox"/>	<input type="checkbox"/> Advanced Healthcare Directive
<input type="checkbox"/>	<input type="checkbox"/> Memorial Instructions
<input type="checkbox"/>	<input type="checkbox"/> Property Agreements
<input type="checkbox"/>	<input type="checkbox"/> Personal effects list
<input type="checkbox"/>	<input type="checkbox"/> Superannuation – Binding Nominations
<input type="checkbox"/>	<input type="checkbox"/> Important Healthcare Information for Minor Children
<input type="checkbox"/>	<input type="checkbox"/> Instructions to Guardians of Minor Children
<input type="checkbox"/>	<input type="checkbox"/> Statement of wishes

Our life is constantly changing, so your estate plan will need to change over time, too. Here are some questions to consider if you're reviewing your estate plan:

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- Do you have a valid Will?
- Is your Will up-to-date?
- Do you have a Will-Kit Will, Home-Made Will or Online Will?
- Do you have a Blended Family or require a Contract for Mutual Wills?
- Is your original Will stored at home?
- Do you have a valid general and / or enduring power of attorney?
- Do you have a valid Advance Care Directive?
- Have you made a binding nomination of your superannuation death benefit insurance entitlement?
- If you have a business, have you considered business succession planning issues?
- Have you considered and made provision for the care and financial support of your children on your death?



ESTATE PLANNING CONSULTATION

Estate Planning goes beyond drafting a Will. TBA Law will guide you through our one-on-one process, creating a well-documented plan that ensures that your wishes are followed.

If you have questions about your estate or situation, get in touch with our team at 1300 043 103 or send an email to admin@tbalaw.com.au