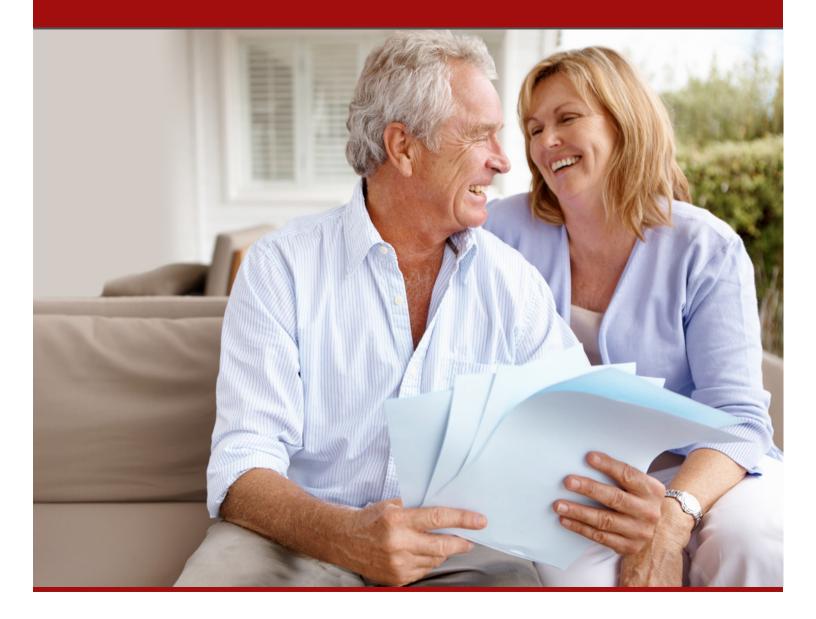
WILLS AND ESTATE PLANNING HEALTH CHECK

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	Don	e
		Family tree
		List of assets and liabilities
		Superannuation statements, SMSF trust deed (if applicable) and family trust deed (if applicable)
		Insurances – life and TPD
		Consider executors
		Consider guardians for your children
		Last Will and Testament
		Mutual Will Agreement
		Consider a testamentary trust
		Enduring Power of Attorney
		Appointment of a Medical Treatment Decision Maker
		Advanced Healthcare Directive
		Memorial Instructions
		Property Agreements
		Personal effects list
		Superannuation – Binding Nominations
		Important Healthcare Information for Minor Children
		Instructions to Guardians of Minor Children
		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?
		ls 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