ESTATE PLANNING ROADMAP

If you're reading this, we needn't tell you here how important your estate planning is. That said, we can make it straight forward so you can make some sensible, informed decisions.

Give us a call and we can explain what you need to do. Wills are not 'one size fits all'. We'll talk to you first, assess what we think your needs are, and give you some choices on what might be the best fit for you. And don't worry, it's obligation free.

Your obligation-free phone call

An opportunity to discuss your queries and establish what options may best suit your circumstances with one of our estate planning paralegals.

Schedule your estate planning consultation

We can organise your consultation around your schedule.

Estate planning consultation

Discuss your circumstances and wishes in greater depth, establish what you require from your estate planning, provide you with advice and take your instructions ready to prepare your documents.

Your first installment is required to be paid into trust before your first consultation, while your second installment is required to be paid into trust on completion of your first consultation.

Estate Planning Fee Proposal

Our team will email you a Fee Proposal tailored to your specific wishes discussed in your estate planning consultation.

Collaboration

We will liaise with your financial planner, accountant and/or family law solicitor, if required, to obtain relevant documents and ensure that we have a comprehensive understanding of any circumstances which could affect your estate planning.

Drafting your estate planning documents

Our team will draft your bespoke estate planning documents, including:

1. Your Will;
2. Your Enduring Power of Attorney;
3. Letter of advice;
4. Statement of Reasons (if applicable);
5. Statement of Wishes (if applicable); and
6. A binding death benefit nomination (if applicable)

Review and amendments

Read through your draft documents, alongside our comprehensive advice which walks you through your documents, to ensure that they reflect your wishes. If required, we can amend your draft documents.

Finalising and signing

Once you are happy that the draft documents reflect your wishes, we will finalise them and arrange for you to sign the documents.

Storage

We can store the original documents in our safe custody storage (a complimentary service) and provide you with copies of your signed documents for your records.

Final Invoice

Once your documents have been signed and finalised, an invoice will be created and paid from the money held in trust. Once this is paid, a copy of the invoice and trust statement will be sent to you.

Reviews and updates

Wills are not a 'set and forget' document – we encourage you to keep them in mind when your life circumstances and journey changes. If you are unsure, a quick phone call to us and we will be able to advise.