# Estate Planning Service

## make it happen

If you die without a Will, your assets will be distributed in terms of intestacy rules in your state, rather than in line with your wishes.

### **Estate Planning Process**

Step 1 ⇔ Needs Assessment

You will complete your needs assessment questionaire.



**Confirm Package** 

A Legal Will (including Guardianship where applicable)

your needs and agree on the package you require.



### What you'll receive



Enduring Power of Attorney - Financial

Enduring Power of Attorney - Medical



Memo of Directions



A review of binding nominations in place



#### Costs



Step 5

Formal

documents

prepared and

sent to

for you to sign.

🖸 Single \$2110 incl GST

Couple \$2720 incl GST

**Optional Extras** 

Testamentary Trust Singles \$2660 incl GST Couple \$3400 incl GST

