ESTATE PLANNING REVIEW

Client Name:	Date:

	YES	NO	Expand
1. Wills			
Do you have a current will?			
Date of last will review:			
Has your personal, family or financial situation changed since last will review?			
Do you believe your will meets your current expectations & wishes?			
2. Family Needs			
Do you believe that your family has been adequately provided for by your current will & protection (insurance) policies?			
Where you have financial dependants (children) have you considered Guardianship in the event of your death?			
Is there a possibility that your estate may be challenged by parties not represented in your current documentation?			
3. Powers of Attorney			
Do you have Power of Attorney documentation that is appropriate for your current circumstances?			
- Are Powers of Attorney <u>Enduring</u>?			
Do you have Medical Power of Attorney?			
4. Asset Structures			
Do you hold assets, including your family home, in joint tenancy?			
Where held are the positions appropriate for your current needs (ie considered asset protection in case of litigation; and asset transfer in case of death)?			
5. Super Assets			
Have you nominated binding death benefit beneficiaries for your super/pension assets?			
Has this nomination been reviewed to ensure it remains appropriate for your wishes as well as beneficiaries tax circumstances?			
6. Trusts			
Are you a member of a discretionary family trust?			
- Beneficiary?			
- Trustee?			
Have you considered creation of a testamentary trust as part of your estate?			
7. Succession Planning			
Are you an owner of a business or in a partnership?			
Have you considered ownership & future of the business and its assets in your personal death or injury?			