

# Estate Planning Solutions

We offer home visits, fixed prices and an easy to understand professional Legal service with free storage of your Wills



## BRONZE WILL

Single from \$480 | Couple from \$770

Uncomplicated estate with a straight forward adult beneficiaries list.



## SILVER WILL

Single from \$820 | Couple from \$1200

Commonly used for families with minor children. Allows for Children's Trust, Super Proceeds Trust, and Right to Reside or Life interest in a property.



## GOLD WILL

Single from \$1200 | Couple from \$2000

Comprehensive Will - a Testamentary Trust package for more complex estates. Includes significant potential tax benefits, also protects vulnerable and problem beneficiaries.

### Your Will is only a part of your Estate Plan...

Other important documents include those used to take care of your affairs if you are incapacitated temporarily or permanently:

**Enduring Power of Attorney** for maintenance of your finances \$200

**Enduring Power of Guardianship** for health-related decisions \$200

**Advance Health Directive** (Living will) for end of life medical treatment decisions \$200; discounts apply for multiple documents or packages

### Our Peace of Mind packages which include Wills and other important legal documents



#### BRONZE WILL and Enduring Powers of Attorney and Guardianship

Single from \$680 | Couple from \$1170



#### SILVER WILL and Enduring Powers of Attorney and Guardianship

Single from \$1020 | Couple from \$1600



#### GOLD WILL and Enduring Powers of Attorney and Guardianship

Single from \$1400 | Couple from \$2400

### Additional Services

**Home visit** to take instructions. \$30 Travel fee for less than 25km or \$50 for greater than 25km from Osborne Park office.

**Binding Death Benefit Nomination** Non-Lapsing - SMSF \$250 Single | \$350 Couple

**Loan Agreements** between family members \$440

**Home signings** for ill, disabled or hospitalised clients - from \$150

**Probate or Letters of Administration** - from \$1100 and court fees

**Change of Ownership of property** - Joint Tenancy to Tenants in Common, \$550 plus any legal advice fees, Landgate fees and stamp duty

**Survivorship application** for transfer to surviving partner - \$550 plus Landgate fees

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## Things to determine before you make a Will

- ▶ Determine your Executors – who administer your estate
  - Provide full names, occupation, address, email and mobile phone numbers for all Executors and Guardians
- ▶ Choose back up Executors in case your first choice is not available
- ▶ Choose Guardians and backup Guardians for your Minor children
- ▶ What specific Gifts of cash or personal possessions do you wish to bequeath?
- ▶ Who will be your main beneficiaries e.g. Spouse/ partner, children, grandchildren?
- ▶ Backup beneficiaries in case of a disaster?
- ▶ Are there any immediate family members you wish to exclude?
- ▶ What age should minor children inherit?
- ▶ If you lose capacity before your death, who will you want to be your Enduring Attorneys and Guardians to manage your affairs?
- ▶ Make a list of your Assets and Debts
- ▶ Do you have a Family Trust or Company or Business that you own? Please provide details and copies of documents
- ▶ Are you planning to divorce or marry in the future?
- ▶ If you have an existing Will please provide a copy
- ▶ Please provide Photo ID for our records

## Our final thoughts

Getting your Estate Plan in place is a vital way of ensuring that your estate is distributed with the right amounts going to the right people at the right time. Not having a Will risks the Court and state legislation determining where your estate ends up. Making a Will is not tempting fate but caring for your next of kin by organising your affairs.

**Call us today on (08) 9368 1337 to make it happen!!**



**WILLCRAFT**  
ESTATE PLANNING

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Liability limited by a scheme approved under Professional Standards legislation

