



Rudall & Rudall

LAWYERS

## **Wills & Estate Planning**

Estate Planning Health Check

# Wills & Estate Planning Health Check

Many people do not have an Estate Plan while others forget to review it regularly to ensure that it adequately addresses their changing requirements. We see the same issues arising for many of our clients and by conducting a “health check” we can identify and help you to avoid potential problems. This checklist has been prepared to help you to consider some of the more common issues but it is not an exhaustive list of all of the issues that need to be considered. We recommend that you schedule an appointment with us without obligation to review your Wills and Estate Planning requirements.

- Do you know what the legal implications are for not having a Will in your circumstances?  Yes  No  Unsure
- Do you have a valid Will?  Yes  No  Unsure
- Is your Will up-to-date?  Yes  No  Unsure
- Do you have a Will-Kit Will, Home-Made Will or Online Will?  Yes  No  Unsure
- Do you have a Blended Family or require a Contract for Mutual Wills?  Yes  No  Unsure
- Do you have a Testamentary Trust Will?  Yes  No  Unsure
- Is your original Will stored at home?  Yes  No  Unsure
- Do you have a valid general and / or enduring power of attorney?  Yes  No  Unsure
- Do you have a valid Advance Care Directive?  Yes  No  Unsure
- Have you made a binding nomination of your superannuation death benefit insurance entitlement?  Yes  No  Unsure
- If you have a business, have you considered business succession planning issues?  Yes  No  Unsure
- Have you considered and made provision for the care and financial support of your children on your death?  Yes  No  Unsure

## Estate Planning Consultation

Contact us if you would like to arrange a review of your Will and Estate Planning documentation without obligation. If you would like us to contact you to arrange a conference, please complete the details below and forward the same to our office.

### Your Details

Full Name:

Telephone Number:

Email:

