



Rudall & Rudall

L A W Y E R S

## **Wills & Estate Planning**

### Overview

# Wills & Estate Planning Overview

Our Wills and Estate Planning Team can assist you to prepare a customised “*Estate Plan*” to address the critical issues for you.

**Ownership** options are essential as some assets may be more effectively owned individually, jointly as joint tenants, jointly as tenants in common, through a trust, self-managed super fund or other entity (and who holds a power of appointment, holds shares or directorship of such entities).

**General and Enduring Powers of Attorney** are required to appoint someone to act for you in relation to your finances and property if you are alive but are incapacitated and unable to make decisions for yourself.

**Advance Care Directives** are required to appoint someone to act for you in relation to personal and medical decisions if you are alive but are incapacitated and unable to make decisions for yourself.

**Superannuation and Insurance** options include Binding and Non-Binding nominations as well as consideration of the appropriate Total and Permanent Disablement, Income Protection, and Death Benefit policies available.

**Wills** set out how your assets are dealt with upon your death in order to avoid the laws of intestacy. Our Team can assist in the preparation of “*Standard Wills*”, “*Non-Standard Wills*” and “*Testamentary Trust Wills*”, the latter providing potentially significant tax and asset protection advantages.

**Protective Trusts** are established to for the benefit of people who are vulnerable and focus on providing care, accommodation and support services.

**Special Disability Trusts** are a trust to provide care and accommodation to a child or other relative with a severe disability resulting in the threshold of assets and income generated by those assets being free of Centrelink.

**Gifts and Loans** should be documented to avoid complications with an estate.

**Blended Family** considerations need to be addressed given the unique position of families where the parents have children from different relationships.

**Statutory Wills** are required in circumstances where a person lacks the capacity to make a Will such as due to dementia or injury.

**Guardianship and Administration Applications** are required in circumstances where a person lacks the capacity to make important personal or financial decisions and where an application is made to the South Australian Civil and Administrative Tribunal to be authorised to make those decisions on their behalf.

## 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: