

WILLS & ESTATE PLANNING

PACKAGES AND PRICES

ESSENTIALS WILL

Individual - \$880 incl. GST

Couple - \$1,430 incl. GST*

*Couple pricing applies to 'mirror' couple Wills only where the terms of both Wills leave everything to each other in the first instance, and to the same beneficiaries in the second instance.

Our Essentials Will package includes:

1. Initial instructions collected via our secure online form, completed at your convenience.
2. Initial estate planning virtual meeting / phone call (30 min) to confirm your instructions and answer preliminary questions
3. Preparation of your standard Will, including:
 - a. Appointment of your executor and back-up executor
 - b. Appointment of a testamentary guardian and back-up guardian to look after any minor children
 - c. Standard estate planning advice with respect to your beneficiaries, (spouse, children, grandchildren and other loved ones), which may involve recommending a more appropriate will package if needed
 - d. Guidance on a number of possibilities and traps that may arise and circumstances under which you should change your Will
 - e. Inclusion of disposal of body wishes, if any.
4. Complimentary signing meeting / preparation of signing instructions
5. Complimentary certified copy of your Will (if executed with us)
6. Complimentary Letter of Wishes workbook
7. Complimentary annual review checklist

OUR ESSENTIALS WILL IS DESIGNED FOR...

- Clients seeking a straightforward Will
- Individuals or couples with a small number of assets
- Clients without asset protection concerns
- Clients who do not require a protective trust for funds for minor children
- Clients without blended family, family provision claim, or family law considerations
- Clients who do not hold assets in trusts, SMSFs, or companies (or who are confident these are separately and appropriately managed)

Please note:

This package does not include complex gifting clauses. It is suitable only for clients wishing to nominate one or two beneficiaries in equal shares.

ESSENTIALS ESTATE PLAN

Individual - \$1,320 incl. GST

Couple - \$2,200 incl. GST*

*Couple pricing applies to 'mirror' couple Wills only where the terms of both Wills leave everything to each other in the first instance, and to the same beneficiaries in the second instance, and 'mirror' appointments for both Enduring Powers of Attorney and Medical Treatment Decision Maker Appointments.

Our Essentials Estate Plan package includes:

1. Initial instructions collected via our secure online form, completed at your convenience.
2. Initial estate planning virtual meeting / phone call (30 min) to confirm your instructions and answer preliminary questions
3. Preparation of your standard Will, including:
 - a. Appointment of your executor and back-up executor
 - b. Appointment of a testamentary guardian and back-up guardian to look after any minor children
 - c. Standard estate planning advice with respect to your beneficiaries, (spouse, children, grandchildren and other loved ones), which may involve recommending a more appropriate will package if needed
 - d. Guidance on a number of possibilities and traps that may arise and circumstances under which you should change your Will
 - e. Inclusion of disposal of body wishes, if any.
4. Preparation of your Enduring Power of Attorney
5. Preparation of your Medical Treatment Decision Maker Appointment
6. Complimentary signing meeting / preparation of signing instructions
7. Complimentary certified copy of your estate planning documents (if executed with us)
8. Complimentary Letter of Wishes workbook
9. Complimentary annual review checklist

OUR ESSENTIALS ESTATE PLAN IS DESIGNED FOR...

- Clients seeking a straightforward Will and comprehensive powers to cover incapacity
- Individuals or couples with a small number of assets
- Clients without asset protection concerns
- Clients who do not require a protective trust for funds for minor children
- Clients without blended family, family provision claim, or family law considerations
- Clients who do not hold assets in trusts, SMSFs, or companies (or who are confident these are separately and appropriately managed)

Please note:

This package does not include complex gifting clauses. It is suitable only for clients wishing to nominate one or two beneficiaries in equal shares.

ENHANCED ESTATE PLAN

Individual - \$2,640 incl. GST

Couple - \$4,180 incl. GST*

*Couple pricing applies to 'mirror' couple Wills only where the terms of both Wills leave everything to each other in the first instance, and to the same beneficiaries in the second instance, and 'mirror' appointments for both Enduring Powers of Attorney and Medical Treatment Decision Maker Appointments.

Our Enhanced Estate Plan package includes:

1. Initial instructions collected via our secure online form, completed at your convenience.
2. Initial estate planning virtual meeting / phone call (45 min) to confirm your instructions and answer preliminary questions
3. Preparation of your testamentary trust Will, including:
 - a. Testamentary discretionary trust provisions
 - b. Incorporation of a superannuation estate proceeds trust to capture any death benefits paid into your estate
 - c. Appointment of your executor/trustee/appointor and back-ups
 - d. Appointment of a testamentary guardian and back-up guardian to look after any minor children
 - e. Standard estate planning advice with respect to your beneficiaries, (spouse, children, grandchildren and other loved ones)
 - f. Tailored advice in relation to the number of trusts to set up and what assets to put into each trust**
 - g. Advice on the provisions governing the trust
 - h. Guidance on a number of possibilities and traps that may arise and circumstances under which you should change your Will
 - i. Inclusion of disposal of body wishes, if any.
4. Preparation / review of your Enduring Power of Attorney
5. Preparation / review of your Medical Treatment Decision Maker Appointment
6. Complimentary signing meeting / preparation of signing instructions
7. Complimentary certified copy of your estate planning documents (if executed with us)
8. Complimentary Letter of Wishes workbook
9. Complimentary annual review checklist

**\$440 incl. GST per additional testamentary trust incorporated

OUR ENHANCED ESTATE PLAN IS DESIGNED FOR...

- Individuals or couples seeking comprehensive estate planning and asset protection
- Clients who have at least \$500,000 of income producing assets (including your family home, super and life insurance)
- Clients who want to protect their inheritance from relationship breakdown (e.g. spouse re-partnering or children separating)
- Clients who want to protect their inheritance from bankruptcy risks
- Clients have concerns about their beneficiaries' ability to manage their inheritance

BESPOKE ESTATE PLAN

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A bespoke Will and estate plan tailored to suit your unique situation. A combination of the below options may be packaged together depending on your assets and your level of risk.

1. An initial estate planning virtual meeting / phone call (45 min)
2. Collaboration with your accountant or financial advisor
3. Preparation of your Will
4. Preparation of testamentary discretionary trust provisions
5. Preparation of superannuation estate proceeds trust provisions to capture any death benefits paid into your estate
6. Preparation of Life Estate or Right to Reside provisions
7. Preparation of a Corporate Power of Attorney
8. Preparation of a Mutual Will Contract
9. Preparation / review of your Enduring Power of Attorney
10. Preparation / review of your Medical Treatment Decision Maker Appointment
11. Complimentary signing meeting / preparation of signing instructions
12. Complimentary certified copy of your estate planning documents (if executed with us)
13. Complimentary Letter of Wishes workbook
14. Complimentary review checklist

A BESPOKE ESTATE PLAN IS APPROPRIATE FOR...

- Clients running a business or company
- Clients with family trusts or self-managed superannuation funds
- Clients who wish to leave someone out of their Will
- Clients who have family provision application concerns
- Individuals or couples with blended families
- Clients whose partners or children run a business or are a director of a company
- Clients who want to protect their inheritance from relationship breakdown (e.g. spouse re-partnering or children separating)
- Clients who want to protect their inheritance from bankruptcy risks
- Clients have concerns about their beneficiaries' ability to manage their inheritance

ENDURING POWER OF ATTORNEY

Individual - \$440 incl. GST

Couple - \$770 incl. GST*

*Couple pricing applies to 'mirror' documents only where the terms of both Enduring Powers of Attorney appoint each other in the first instance, and the same attorneys in the alternative.

An Enduring Power of Attorney is a very important and powerful legal document that allows someone, known as your attorney, to make personal or financial decisions on your behalf if you are unable to do so due to illness, accident, or age-related incapacity.

In limited circumstances, it may also be appropriate to appoint someone to manage your financial and legal affairs immediately, even while you still have decision-making capacity.

1. An initial estate planning virtual meeting / phone call (15 min) to confirm your instructions
2. Preparation of your Enduring Power of Attorney, including:
 - a. Appointment of your attorney and alternative attorney for financial and personal matters
 - b. Inclusion of standard limitations and conditions on the attorneys.
3. Preparation of signing instructions*

MEDICAL TREATMENT DECISION MAKER APPOINTMENT

Individual - \$440 incl. GST

Couple - \$770 incl. GST*

*Couple pricing applies to 'mirror' documents only where the terms of both Medical Treatment Decision Maker Appointments appoint each other and the same subsequent decision-makers.

A Medical Treatment Decision Maker is someone you give the authority to make medical and healthcare decisions on your behalf, if you are unable to do so due to illness or incapacity.

1. An initial estate planning virtual meeting / phone call (15 min) to confirm your instructions
2. Preparation of your Medical Treatment Decision Maker Appointment, including:
 - a. Appointment of your attorney and alternative attorney for financial and personal matters
 - b. Inclusion of standard limitations and conditions on the attorneys.
3. Preparation of signing instructions*

***Add-on signing meeting: \$175 incl. GST**

- one fee applies for all documents signed together
- complimentary certified copies of all documents (if executed with us)

EXCLUSIONS & TERMS & CONDITIONS

Our Essentials Wills & Estate Planning packages are designed to leave your entire estate to a primary beneficiary, with:

- A single “giftover” clause to back-up beneficiaries in equal shares, and
- A further back-up “calamity” clause.

If your circumstances fall outside the standard scope, we will provide you with a tailored fixed-fee proposal.

Common exclusions (which typically require more complex clauses or structures) include:

- **Superannuation nominations (excluding SMSFs)**
 - Review your binding death benefit nomination form: \$220 incl. GST per person
 - Prepare your binding death benefit nomination form: \$220 incl. GST per person
- **Right to reside:** You want to leave real estate to one person but allow someone else to live in the property until they die/re-partner/move out: \$660 incl. GST
- **Mutual Will Contract:** You want to prepare a Mutual Will Contract to contractually agree with your partner not to change their Will: \$2,200 incl GST
- **Specific Gifts:** You wish to make more than one specific gift (e.g. multiple gifts of jewellery, motor vehicles, cash): \$132 incl. GST per additional gift
- **Changing Real Property Ownership:** You need to change the way you own a property with someone (e.g. from joint tenants to tenants in common): \$1,540 incl. GST plus disbursements
- **Capacity Assessment:** There are concerns about your testamentary capacity and we are required to prepare a letter to your usual treating GP or specialist for a medical report: \$660 incl. GST
- **Follow-ups:** If documents are not signed in a timely manner and we are required to issue reminders: \$110 incl. GST per follow up telephone attendance or correspondence
- **Extra Review meeting:** \$660 incl. GST per hour or part-thereof.
- **Urgent document preparation:** Where you require documents prepared on an urgent basis (within one week from receipt of instructions): \$660 incl. GST

Important Note: Our package pricing assumes that you are comfortable providing your initial instructions through our secure online form. If you would prefer to provide your instructions in a virtual or in-person meeting, additional fees will apply at \$440 (incl. GST) per hour or part thereof.

**This price list is current as at August 2025 and is subject to change without notice.
Written quotes are valid for 30 days.**

Liability limited by a scheme approved under Professional Standards Legislation.