



ESTATE PLANNING SNAPSHOT CHECKLIST

Getting your estate planning sorted is all about having peace of mind that the right assets and information pass to the right people at the right time.

To ensure we have an accurate snapshot of your circumstances so we can guide you through this peace of mind process, we would love to see the following material from you:

CORE INFORMATION

- ☐ **Details of your immediate family tree (including parents, siblings, children and any grandchildren) including:**
 - ☐ Complete name and known aliases
 - ☐ Age
 - ☐ Whether any family members live overseas
 - ☐ Whether any family member has special medical needs or disabilities
 - ☐ Is there anything relating to your family that you are worried about if you pass away?
- ☐ **Summary of your assets and liabilities, including:**
 - ☐ The approximate market value and any associated debt for each asset
 - ☐ Details of the registered owner of each asset
 - ☐ Location of assets (whether within Australia or overseas)
 - ☐ Details of how the assets are owned (i.e. solely, as joint tenants or as tenants in common)

- ☐ **Superannuation binding death benefit nominations and/or reversionary pensions**
- ☐ **Life insurance details (whether owned personally or through your super)**

If any of the following also applies to you, we would love if you could provide this additional information so that we have a complete snapshot of your circumstances:

ADDITIONAL INFORMATION

- ☐ Your current estate planning documents (i.e. wills and powers of attorney documents)
- ☐ All trust deeds (including deeds of amendments, changes to controllers etc) for each trust in your group
- ☐ All company reports (showing shareholders and directors) and constitutions for each company
- ☐ Self-managed superannuation fund deed (including deeds of amendments, changes to controllers etc)
- ☐ Details of assets you may inherit from other people (e.g. your parents)
- ☐ Rates notices for any property
- ☐ Financial statements for any trusts, companies, partnerships or self-managed superannuation funds in your group
- ☐ Details of any overseas assets
- ☐ Details of any gift recipients who live overseas
- ☐ Details of assets held jointly with other people (other than your spouse)
- ☐ Are you expecting to receive any inheritance?
- ☐ Are you known by several different names or aliases?

- ☐ **Are you:**
 - ☐ Getting married, divorced or separating from your spouse?
 - ☐ Expecting a child?
 - ☐ Intending on moving interstate or overseas in the short term?
 - ☐ Running a business, a director or in a high risk occupation?