



Your Estate Planning Blueprint: Client Welcome Guide

Having a comprehensive and up to date estate plan will give you so much certainty and peace of mind knowing your affairs are in order.

Estate planning for female business owners or women with complex assets and personal circumstances.

TABLE OF CONTENTS

- 1 WELCOME
- 2 WHAT TO EXPECT FROM US
- 3 WHO YOU'LL BE WORKING WITH
- 4 ESTATE PLANNING JOURNEY
- 5 HOW WE CHARGE
- 6 GET STARTED
- 7 THE FINE PRINT
- 9 WHAT OUR CLIENTS SAY ABOUT US

WELCOME



Welcome! As an experienced estate planning lawyer, I am thrilled and honored to embark on this meaningful journey with you. This client onboarding guide has been thoughtfully curated to ensure that you feel confident and supported throughout the entire estate planning process.

In these pages, you will find comprehensive information about the estate planning journey ahead, from understanding the fundamentals of estate planning to crafting personalised strategies that align with your unique aspirations. Our mission is to provide you with peace of mind and security, knowing that your legacy and loved ones will be protected according to your wishes. We believe in building strong, trusting relationships with our clients, and we are committed to going above and beyond to address your concerns and cater to your needs.

Together, let's create a solid foundation for a prosperous future, leaving behind a legacy that will resonate for generations to come. Welcome once again, and thank you for choosing us as your trusted estate planning partner.

With warm regards,
Adele M Anthony, Your Estate Planning Lawyer

WHAT TO EXPECT FROM US

We're an estate planning law practice focused on delivering exceptional service and value. We stand by delivering:

- Personalised attention and compassionate care that truly makes a difference
- Availability outside business hours
- Video chat or phone call consults
- In-person consults
- Fixed fee, no bill shock, up front quote

We operate by appointment only.

We wholeheartedly understand the challenges of juggling a busy life, and we are committed to making things easier for you. We offer flexible appointments by arrangement, and yes, even Saturday mornings, so you can feel at ease knowing that we're here to accommodate your needs and ensure that estate planning seamlessly fits into your life's beautiful tapestry. Your dreams and aspirations are precious to us, and we'll go the extra mile to ensure that your journey towards securing your legacy is as smooth and convenient as can be.

If you leave an email or phone message, rest assured that we hold your messages close to our hearts, and within the comforting embrace of our standard hours, we promise to reach out to you with a response within 2 business days - often it may be earlier than this.

As we run our practice from a serviced office in Toowoomba, we prefer to not keep or store original estate planning documents on behalf of our clients unless absolutely necessary.

WHO YOU'LL BE WORKING WITH

ADELE M ANTHONY, LLM, LLB, BBus, GDLP

Director, Founder and Principal Lawyer, Adele M Anthony Legal

Hi, I'm Adele. I'm an award winning, passionate estate planning lawyer who has undertaken several years of further education and training to obtain my Masters of Law in this specialised field. I am experienced in preparing sophisticated estate plans for female business owners and females with complex assets and personal circumstances. I love helping my clients protect their hard earned assets, reduce tax and limit potential claimants from attacking their estates.

I look forward to meeting you!



ESTATE PLANNING JOURNEY

01

BOOK A DISCOVERY CALL

15-minute no obligation chat with us to determine your estate planning needs.

02

BOOK A STRATEGY SESSION

We gather all the information required to prepare your estate plan and discuss how to ensure it's both strategic and sound.

03

REVIEW

We go through your documents with you to ensure you are happy with your estate plan, make any additions or alterations you might require and answer any questions you have.

04

SIGNING

We arrange for you to sign your documents.



COMMUNICATION

CONTACT DETAILS

hello@adelemanthonylegal.com

OFFICE HOURS

BY APPOINTMENT ONLY

HOW WE CHARGE



At Adele M Anthony Legal, we believe in transparency and putting our clients' interests first. That's why we have adopted a fixed fee approach for all our estate planning services. We understand that the estate planning process involves careful consideration and should not be burdened by worries about hourly rates or unexpected costs. With a fixed fee structure, you can rest assured that there will be no surprises at the end of the matter. We provide a clear and comprehensive breakdown of the costs upfront, ensuring you have a complete understanding of the investment required for your tailored estate plan.

Our commitment to a fixed fee model is rooted in our dedication to delivering exceptional value to our clients. You can have peace of mind knowing that our focus remains on crafting a comprehensive estate plan that best meets your needs and aspirations, without any hidden costs. Your legacy deserves the utmost attention and care, and by choosing Adele M Anthony Legal, you can trust that we are fully devoted to providing you with top-notch service, personalised solutions, and the peace of mind you deserve. Let us guide you on this important journey towards securing your future and protecting what matters most to you.

GET STARTED



At the core of our practice is a heartfelt commitment to our clients. As a Queensland-based firm, we have embraced the power of technology to deliver exceptional service and unwavering value. We take immense pride in standing by our clients, supporting them every step of the way as they navigate the complexities of estate planning and preserving their legacies. Your dreams and aspirations are our driving force, and we are devoted to providing you with personalised, compassionate care that exceeds expectations. Together, we embark on this meaningful journey to create a lasting impact and secure a brighter future for you and your loved ones.

To get started, we have the following two options available:

- **15-minute no obligation Discovery Call** to get you started
- **One hour Strategy Session** - \$295 (plus GST) if you are ready to get your estate planning sorted - *if we are retained by you to complete your estate planning, our total professional costs quoted is reduced by this amount.

THE FINE PRINT

As required by the legal profession in Australia, we are obliged to give you a Costs Agreement and Disclosure Notice that sets out your rights and obligations when dealing with a solicitor, and which incorporates an authority and undertaking required for account administration purposes. This document also includes a Cyber Warning which we ask that you read. We will ask that you sign and return the document to us.

We note that you are entitled to seek independent legal advice before signing the Costs Agreement & Disclosure Notice if you wish.

The Costs Agreement will set out the work we are to do for you and our fees (inclusive of GST). The scope of the work will not extend to: a) providing business or financial advice. You should seek this advice directly from your Accountant, financial adviser/s; b) superannuation advice; c) family law advice (unless it is a family law matter); d) providing advice in relation to a family provision claim being made against your estate and strategies to minimise the risk of a potential claim being made; or e) Centrelink and/or pension advice.

Our retainer may be terminated: 1) with your agreement; 2) if you give us notice that you no longer wish us to act; 3) if we give you reasonable notice that we are terminating the retainer for just cause, which may include: * you have given us instructions that are not lawful, proper or competent; * your acts or omissions are inconsistent with us continuing to represent you, preventing us from properly performing our duties; * we identify a conflict of interest or duty and cannot ethically continue to act for you; * we are not able to properly verify your identity or your authority to give instructions; * you have refused to reimburse disbursements we have paid on your behalf; * you refuse to provide reasonable security for our legal costs; * you fail to provide adequate instructions within a reasonable time; or * if the retainer comes to an end at law. If you continue to contact us and give us instructions, you will be deemed to have accepted the terms of our Costs Agreement.

What our clients say about us

client TESTIMONIALS

“

If you want to deal with a lawyer who really sees you as a person and not just another client then please do not look past Adele. Every step of our Will and EPOA was smooth and we felt at ease. Highly recommended.

 Like

 Comment

 Share

WWW.ADELEMANTHONYLEGAL.COM

client TESTIMONIALS

“

Adele M Anthony, Your Legacy Lawyer is just amazing 🙌 She has done wills & Enduring Power of Attorneys for myself & my husband & both sets of parents. She is so thorough, patient & accommodating. Cannot recommend her highly enough!

6d [Like](#) Reply

3 

VISIT MY WEBSITE NOW TO LEARN MORE