

Need to update your **WILL?**

FREE Will Review!

Book in with our Estates team today!

Has your family situation changed?

- Married or started a new de facto relationship;
- Separated or divorced;
- Changed or intend to change name;
- Become or likely to become bankrupt, or discharged from bankruptcy;
- Moved interstate or overseas;
- Had or decided to have children?

Do you have concerns about the *motive* or *ability* of the people you have nominated to be your:

- Executors;
- Trustees or Appointors for any testamentary trusts;
- Attorneys for financial matters;
- Attorneys for personal and health matters;
- Guardians of your minor children;
- Replacement trustees of any family or self-managed superannuation trust;
- Replacement directors or shareholders of any private company;
- Superannuation death beneficiaries?

Has your financial situation changed?

- Acquired any significant new assets or cash (jointly or alone);
- Incurred any significant new financial liabilities (eg. personal loans);
- Lent anyone money;
- Sold any assets promised specifically to someone in your Will;
- Changed or ended your superannuation;
- Started a new business or partnership;
- Ended a business or partnership;
- Created or ended a trust;
- Transferred assets into or out of a trust;
- Transferred or acquired assets overseas or interstate;
- Taken out, ended or changed a life insurance policy?

Have you checked the following?

- Has anyone named in your estate planning documents died or suffered a mental impairment?
- Are you still happy with the beneficiaries you have nominated, and the share of your estate they will receive?
- Do you now believe someone might challenge your Will?
- Has anything else changed that might affect your estate planning?

Contact us for a FREE Will Review!

Wills vary depending on your assets, family situation, and of course, your personal desires. Maintaining an updated succession plan is essential.