

Welcome to
Coastal *Law Group*

A WARM WELCOME FROM OUR DIRECTOR

Welcome, and thank you for choosing Coastal Law Group.

I understand that seeking legal advice often comes at an important time in your life. Whether you are planning for the future, making an important transition or dealing with the affairs of someone you love, the decisions you make can have lasting consequences.

Our role is to make the legal process as clear and straightforward as possible. We want you to understand your options, feel comfortable asking questions and have confidence in the decisions you make.

Thank you for placing your trust in Coastal Law Group. I look forward to assisting you.

Caitlin Evangelista
Director



Disclaimer

This guide provides general information only and does not constitute legal advice. You should obtain legal advice about your individual circumstances before making any decisions.

ABOUT US



Coastal Law Group is a boutique law firm focused on providing practical legal advice when it matters most.

We believe that good legal advice is about more than preparing documents. It is about looking at the bigger picture, identifying potential issues and helping ensure your legal arrangements work together to achieve what matters to you.

Our practice has a particular focus on estate planning and administration, retirement living and aged care, and manufactured homes.

As a boutique practice, we value quality, personal service and genuine client relationships. We aim to provide a consistent, personalised experience from your first appointment through to the completion of your matter.

Our goal is simple: to provide thoughtful legal advice that gives you clarity, confidence and peace of mind.

OUR AREAS OF PRACTICE



Estate Planning

Estate planning is a highly personalised process that extends beyond the preparation of a Will and Enduring Power of Attorney. It involves a comprehensive review of your assets and the legal structures governing them—such as superannuation, trusts, companies and jointly held property—to ensure they are effectively managed, protected and distributed in accordance with your wishes.

A properly prepared Will, supported by tailored legal advice, can help safeguard your assets, minimise the risk of disputes and ensure your intentions are clearly documented and carried out, providing peace of mind for you and your loved ones.

Estate Administration and Probate

Estate administration is the process of finalising a person's affairs after death. This responsibility is typically undertaken by the executor named in the Will, or by an administrator appointed in accordance with legislation where no Will exists.

Estate administration can be complex, time-consuming and emotionally challenging, particularly during a period of grief. It also involves important legal and taxation obligations.

Often, in the course of administering an estate, a Grant of Probate may be required. An application for a Grant of Probate needs to be made to the Supreme Court.

Manufactured Homes, Retirement Living and Aged Care Advice

Whether you are considering purchasing or selling a manufactured home, moving into retirement living or transitioning into aged care, it is important to understand your rights and obligations before making such a significant personal and financial decision.

HOW WE WORK WITH YOU



01

Listen

We take the time to understand your circumstances and what matters to you.

02

Identify

We identify legal, practical and potential future issues you may need to consider.

03

Advise

We explain your options clearly and provide advice tailored to your circumstances.

04

Implement

We prepare the appropriate legal documents and guide you through the signing process.

05

Review

We encourage you to review your legal arrangements regularly and whenever your circumstances change.

CYBER ALERT



Please take a moment to read the Cyber Alert on the following page.

As your lawyers, we take the security and confidentiality of your personal information seriously. Cyber scams, email fraud and identity theft are increasingly sophisticated, particularly where legal and financial transactions are involved.

The Cyber Alert contains practical information to help you recognise common cyber risks and protect yourself from fraud. We encourage you to read it carefully and remain vigilant, particularly when receiving requests involving bank account details, payments or changes to payment instructions.

If you receive a request that appears unusual or unexpected, please contact us on 07 5646 6292 before taking any action.

A few moments of caution can help prevent significant financial loss.

Cyber Alert

Funds transfer critical information

People across Australia have lost money when hackers have impersonated a law practice or another party involved in a legal matter by altering electronic communications including email, fax, social media, text, instant messaging, applications, file sharing and documents including PDF or Word documents. The following steps are critical to reduce this risk and if you are involved in a transfer of funds these are our expectations of you in helping to reduce the risk of such loss. Any retainer with us is on the basis of the following acknowledgements by you.

To Coastal Law Group Pty Ltd ACN 694 856 267 t/as Coastal Law Group ("Coastal Law Group"). In this matter, where payment details are contained in an electronic communication or document, I acknowledge I:

MUST NOT

Transfer any funds (send, deposit, pay or transfer) of more than \$10,000 Australian dollars or its equivalent in any other currency (or give any funds transfer information I receive to someone else) **without first** telephoning the apparent original sender to verbally confirm the account number, details and amounts by reading out and reading back the account and BSB numbers (or other specific payment details where applicable, e.g. if not a bank account) and confirming any instructions; and

MUST

Give the same warnings to anyone else known to be connected to the matter and anticipated to be involved in transferring or receiving any funds or funds transfer information (including but not limited to, agents, brokers, family members, accountants).

I must also:

- when calling to check payment details above, **only use a phone number for the apparent original sender which I have verified from a source that is different to the communication containing those details**, for example a separate paper communication or checking the person's website or white or yellow pages telephone listing;
- contact the sender to check legitimacy **before** I open attachments, or click on hyperlinks or download buttons in unexpected emails; and
- contact you immediately if in any doubt about emails or any other electronic communications that appear to have come from you.

PLEASE NOTE: I also acknowledge Coastal Law Group will not transfer money out of their practice until they are able to verify any funds transfer information by a voice call to confirm those details (by reading out and reading back the account and BSB numbers or other specific payment details where applicable, e.g. if not a bank account). I understand I must make sure I can be contacted if I need any funds transferred by a specific time, otherwise my objectives may not be met.

WHAT HAPPENS NEXT?



After your initial appointment:

- 01 Confirm Instructions**
We'll summarise the advice provided and any decisions or instructions that need to be confirmed.
- 02 Provide an Estimate of Costs**
Where appropriate, we'll provide information about our anticipated legal fees and any significant additional costs.
- 03 Prepare Documents**
Once you have provided your instructions and we have the information we need, we'll prepare your documents.
- 04 Progress Updates**
We'll let you know what we need from you, what happens next and when you can expect to hear from us.
- 05 Finalisation of Matter**
We'll guide you through signing, witnessing and any other steps required to put your legal arrangements into effect.



HAVE QUESTIONS?



Get in touch with us. We're here to help.

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Scan here to go
directly to our
website!

