

Preparing for Your Estate Planning Appointment



WELCOME

Hi there!

Have you booked your initial estate planning appointment? Congratulations on taking an important step towards protecting yourself and your loved ones. We look forward to welcoming you.

We've prepared this guide to help you make the most of your initial appointment.

Inside you'll find a checklist of documents to bring, together with some important matters to think about before your appointment.

Coastal Law Group

Disclaimer: This guide is not legal advice and is not to be relied on as legal advice. This guide contains information of a general nature only. Ensure you obtain appropriate legal and taxation advice prior to implementing an estate plan.



WHAT TO BRING

Bringing these documents will help us provide advice tailored to your specific circumstances, from the very first appointment. Don't worry if you can't locate a document, we can help track it down!



- ☐ Original identification documents (such as your current driver licence and passport)
- ☐ A copy of your existing estate planning documents (for example, your existing Will, Enduring Power of Attorney, or Advance Health Directive)
- ☐ A copy of your existing binding death benefit nomination (if you have one)
- ☐ A copy of the trust deed for any trusts in which you have an interest (if applicable)
- ☐ A copy of your self-managed superannuation fund trust deed (if applicable)
- ☐ Details of any companies in which you have an interest (if applicable)
- ☐ The full name, residential address, phone number, and email address (if known) of any person you may wish to include in your estate plan

MATTERS TO CONSIDER

Don't worry if you haven't decided on everything yet. Thinking about these matters beforehand will help you get the most out of your appointment.



01

Executorship

Who would you like to administer your estate after your death? You can appoint someone to act solely, or a number of people to act jointly. You can appoint individuals to act successively (for example, you appoint someone to act in the first instance but, if they are unable or unwilling to act, you appoint someone to fill the role).

02

Guardianship

If you have children under the age of 18, who would you like to appoint as their legal guardian if you die before they reach adulthood?

03

Specific Gifts

Are there any items that you wish to gift to someone in particular? If you have items of value, whether monetary or sentimental, you can stipulate in your Will whom you wish to gift these specific items to.

04

Distribution of Your Estate

Who do you want to benefit from your estate? What proportion of your estate should each beneficiary receive (for example, equal or unequal shares)?

If one of your chosen beneficiaries dies before you do, who do you want to receive that gift under your Will? Do you want it to pass to their children or be shared between your other chosen beneficiaries?

05

Backup Beneficiaries

If all of your initial beneficiaries die before you do, who would you want to benefit from your estate? This could be other family members or charitable organisations.

06

Burial Wishes

Do you wish to be buried or cremated? If so, do you wish to specify where you want to be buried or how you would like your ashes to be dealt with?

WHAT HAPPENS AT YOUR APPOINTMENT

No surprises here! This is what will happen
at your appointment.



- 01 We will get to know about you and your family
- 02 We will get an overview of your assets
- 03 We will discuss your wishes and intentions
- 04 We will explain your options in plain English
- 05 We will answer your questions
- 06 We will discuss the best estate plan for your specific circumstances



QUESTIONS?



Get in touch with us, we'd love to help!

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