



INFORMATION REQUIRED

<i>Copies of any existing will or power of attorney documents</i>	<input type="checkbox"/>
<i>Trust deed for any trusts (and any related documents such as deeds of variation and changes of trustee)</i>	<input type="checkbox"/>
<i>Trust deed establishing any superannuation fund (and any related documents such as deeds of variation)</i>	<input type="checkbox"/>
<i>Any binding death benefit nomination or pension documentation</i>	<input type="checkbox"/>
<i>Most recently available ASIC extract, constitution and shareholder agreements (if any) for any companies</i>	<input type="checkbox"/>
<i>Any current statement of advice or fact find you have been provided by a financial adviser</i>	<input type="checkbox"/>
<i>Details of any life insurance arrangements (ideally copies of the policy documents)</i>	<input type="checkbox"/>
<i>Most recently available financial statements (including the notes) for you and each entity in the group</i>	<input type="checkbox"/>
<i>Summary of the main assets and liabilities for you, including ownership structure (if known)</i>	<input type="checkbox"/>
<i>Confirmation of any assets held in New South Wales</i>	<input type="checkbox"/>
<i>Any structure diagram for the group</i>	<input type="checkbox"/>
<i>Details of the immediate family tree</i>	<input type="checkbox"/>
<i>Details of all directorships or any roles that might carry personal liability for you and the main people to benefit under the estate (for instance, a director of a trading company)</i>	<input type="checkbox"/>
<i>Broad details of any assets that may pass to you from another estate (for example, from close relatives)</i>	<input type="checkbox"/>
<i>Whether there are any people who could potentially be dissatisfied with the distribution of your estate and might seek to challenge the provisions of the estate plan</i> <i>This would include any children, former spouses (de facto or married) and anyone who you have provided financial assistance to in the past</i>	<input type="checkbox"/>
<i>Whether any of the intended beneficiaries have asset protection issues to be considered (eg are minors, have unstable personal relationships, are in business or are in high risk occupations)</i>	<input type="checkbox"/>
<i>Any binding financial agreement or property settlement with any current or former spouse</i>	<input type="checkbox"/>
<i>Details of any assets or people you intend to benefit under your estate plan located overseas</i>	<input type="checkbox"/>
<i>An overview of the key objectives in relation to the proposed estate plan</i>	<input type="checkbox"/>

The above summary is based on the law as at 25 June 2023

This summary covers legal issues in a general way. It is intended for information purposes only and should not be regarded as legal advice. View Legal does not assume a duty of care in connection with this document and further advice should be obtained before taking action on any issue mentioned.