

Checklist - Foundation questions to assist with facilitating a robust estate plan

OVERVIEW

A customer who answers yes to any one of the following questions will likely need a two meeting approach.

THE QUESTIONS

	YES	NO
If a couple, are the wills to be different, i.e. not on mirror terms?	<input type="checkbox"/>	<input type="checkbox"/>
Are there to be any specific gifts to beneficiaries? <i>This does not include personal items or items of sentimental value which can be added to the Memorandum of Directions.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Are there to be any hotchpot / equalisation provisions required for any gifts to beneficiaries or to the testamentary trusts?	<input type="checkbox"/>	<input type="checkbox"/>
In the event of a calamity, does the customer intend on gifting their estate to more than 4 beneficiaries?	<input type="checkbox"/>	<input type="checkbox"/>
Does the customer have any dependants who have special needs, dependencies or addictions?	<input type="checkbox"/>	<input type="checkbox"/>
Does the customer or anyone to be named under the will have a blended family?	<input type="checkbox"/>	<input type="checkbox"/>
Are there any previous life spouse relationships where there has not been full financial closure?	<input type="checkbox"/>	<input type="checkbox"/>
Do any of the customer's intended beneficiaries or key people nominated under their estate plan reside, or intend to reside, overseas?	<input type="checkbox"/>	<input type="checkbox"/>
Is there anyone who might be likely to challenge the customer's estate?	<input type="checkbox"/>	<input type="checkbox"/>
Is there any child, current spouse or other dependent who is being excluded from the estate?	<input type="checkbox"/>	<input type="checkbox"/>
Is the estate valued at more than \$5 million?	<input type="checkbox"/>	<input type="checkbox"/>
Does the customer have involvement in one or more entities (e.g. a company, trust or self-managed super fund)?	<input type="checkbox"/>	<input type="checkbox"/>

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Does the customer own any assets with a third party (other than with their spouse)?	<input type="checkbox"/>	<input type="checkbox"/>
Does the customer own any assets overseas?	<input type="checkbox"/>	<input type="checkbox"/>
Does the customer own real property outside their usual state of residence?	<input type="checkbox"/>	<input type="checkbox"/>
Has the customer ever agreed to make a mutual will, or entered into anything that creates an obligation about the customer's estate (including a binding financial agreement (FA) or a court order)? <i>If there is a FA, a copy should be provided to View for review.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Is it intended to grant a person a right to occupy or life interest in any asset?	<input type="checkbox"/>	<input type="checkbox"/>
Is the customer uncertain about their estate planning choices?	<input type="checkbox"/>	<input type="checkbox"/>
Does the customer wish to allocate more than 10 minutes of the meeting time to allow them to ask questions about their estate plan with View's specialist estate planning lawyer?	<input type="checkbox"/>	<input type="checkbox"/>
In relation to Testamentary Trusts are the Nominated Beneficiaries persons other than the will maker's spouse or children?	<input type="checkbox"/>	<input type="checkbox"/>

Adviser Facilitated Estate Planning is not suitable for a customer who answers yes to any one or more of the following questions:

Does the customer require an interpreter to read English or to understand spoken English, is deaf or blind, lacks capacity, or is suffering other mental impairment? <i>A traditional legal approach would be more appropriate for the customer rather than View's online platform</i>	<input type="checkbox"/>	<input type="checkbox"/>
Is the customer over 80 years of age? <i>The risk of capacity being brought into question and subsequent estate challenges tends to increase every year after the age of 80.</i>	<input type="checkbox"/>	<input type="checkbox"/>

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Is the customer suffering a terminal or life-threatening illness or is currently in hospital? <i>A traditional legal approach would be more appropriate for the customer rather than View's online platform</i>	<input type="checkbox"/>	<input type="checkbox"/>
There is a preference not to use testamentary trust.	<input type="checkbox"/>	<input type="checkbox"/>

You can access View's diagnostic tool 'Free Review' [here](#).

If you specialise in providing facilitated estate planning solutions for your customers, have you been accredited? Learn more [here](#).