Completion of a Free Review for all new matters, including estate planning, asset protection and amendments to documents prepared by View Legal or elawyer is recommended.  The best placed team member at View Legal will be in contact via email with the next step for you and your customer to implement the appropriate solution based on information provided.

View Community members have unlimited access to decision matrices and other toolkits to assist with determining the most likely pathway for each customer’s unique situation, while ensuring value is appropriately positioned for your business.  Log in to your dashboard [here](https://comviewnities.com/adviewser/) to access your resources. Many advisers keep each matrix printed up for easy referencing while assisting customers.

**Please note this form is to be used as a checklist and is for collection of data only. To submit a Free Review, please input the required data via the link** [**here**](https://viewlegal.com.au/estate-planning-free-review/)**.**

|  |  |
| --- | --- |
| **Contact details**  Items showing \* are required fields | |
| **Firm name\*** |  |
|  |  |
| **Adviser contact name\*** |  |
|  |  |
| First | Last |
| **Adviser email\*** |  |
|  |  |
| **Adviser phone\*** |  |
|  | |
| **Customer details** | |
| **Name of customer 1\*** |  |
|  |  |
| First | Last |
| **Date of birth\*** |  |
|  |  |
| **Does customer 1 have a spouse (married, civil partnership or de facto)?\*** | |
| Yes |  |
| No |  |
| **If YES, name of customer 2 (i.e. spouse)\*** |  |
|  |  |
| First | Last |
| **If NO, are the documents to be made in contemplation of marriage\*** | |
| Yes |  |
| No |  |
| **Background information** |  |
| **Is this Free Review for a new estate planning matter or a variation to pre-existing View Legal (or elawyer) estate planning documents? \*** | |
| New Estate Planning documents |  |
| Variation to pre-existing View Legal (or elawyer) estate planning documents |  |
| **Does the document have View Legal or elawyer logo on the first page\*** | |
| Yes |  |
| No |  |
| **Are the documents more than 2 years old\*** |  |
| Yes |  |
| No |  |
| **Date of original estate planning documents:\*** |  |
| Date known |  |
| Date unknown |  |
| **Provide a summary of how the customers would like their estate/s to be distributed on their death\*** | |
|  | |
| **Does the customer intend on making any specific gifts to beneficiaries other than cash?\*** | |
| Yes |  |
| No |  |
| **In the event of a calamity (i.e. all immediate family dying in one incident), does the customer intend on gifting their estate to more than 4 beneficiaries?\*** | |
| Yes |  |
| No |  |
| **Does the customer have any dependants who have special needs, dependencies or addictions?\*** | |
| Yes |  |
| No |  |
| **Does the customer or anyone to be named under the will have a blended family (that is, children from different relationships?)\*** | |
| Yes |  |
| No |  |
| **Are there any previous life spouse relationships where there has not been full financial closure?\*** | |
| Yes |  |
| No |  |
| **Do any of the customer’s intended beneficiaries or key people to be nominated under the estate plan reside or intend to reside overseas?\*** | |
| Yes |  |
| No |  |
| **Is there anyone who might be likely to challenge the customer's estate (for example, step-children, estranged children, former spouses with whom they have not reached financial closure, or any person to whom they provide regular financial assistance?)\*** | |
| Yes |  |
| No |  |
| **Set out a summary of the family tree, including the age and risk profile (e.g. bankruptcy, relationship concerns or spendthrift risks) of any person who is an intended beneficiary of the estate\*** | |
|  | |
| **What is the approximate value of the estate?\*** | |
| **$** | |
| **Are there any assets held jointly by the customer with their spouse?\*** | |
| Yes | |
| No | |
| **Are there any trusts in the customer’s group?\*** | |
| Yes | |
| No | |
| **Are there any companies in the customer’s group?\*** | |
| Yes | |
| No | |
| **Does the customer have any superannuation savings?\*** | |
| Yes | |
| No | |
| **Does the customer have any life insurance?\*** | |
| Yes | |
| No | |
| **Does the customer own any assets with a third party (other than their spouse)?\*** | |
| Yes | |
| No | |
| **Does the customer own any assets overseas?\*** | |
| Yes | |
| No | |
| **What State does the customer reside in?\*** | |
| **Does the customer live in close proximity to the border of two states/territories?\*** | |
| Yes | |
| No | |
| **Does the customer hold any real property outside their usual State of residence?\*** | |
| Yes | |
| No | |
| **Has the customer entered into anything that creates an obligation about their estate (including a binding financial agreement (FA) or a court order)?\*** | |
| Yes | |
| No | |
| **Is the customer uncertain about their choices?\*** | |
| Yes | |
| No | |
| **Does the customer wish us to allocate more than 10 minutes of the meeting time to allow them to ask questions about their circumstances with View’s specialist lawyer?\*** | |
| Yes | |
| No | |
| **Does the customer require an interpreter to read English or to understand spoken English?\*** | |
| Yes | |
| No | |
| **Does the customer have any physical or mental disabilities or are they over 70 years of age?\*** | |
| Yes | |
| No | |
| **Is the customer suffering a terminal or life threatening illness or is the customer currently in hospital, and the documentation is more than ordinarily urgent?\*** | |
| Yes | |
| No | |
| **Are there any other key issues or areas of concern in relation to the customer’s circumstances?\*** | |
| Yes | |
| No | |
| **Provide any additional comments in relation to your customers circumstances** | |
|  | |

**Documents**

Please provide copies of:  
(a) Any completed fact find that you use in your business (if any);  
(b) List of assets and liabilities – refer to this [FAQ](https://viewlegal.zendesk.com/hc/en-au/articles/900001853383-Suggested-form-of-client-asset-data-required-for-Estate-Planning-matters) for assistance;  
(c) Any binding financial agreement in place; and  
(d) Source documents for any connected entities (for example trust and superannuation fund deeds (and any variations), ASIC extracts, constitutions and rates notices)  
Note: If file exceeds 64MB size limit, please share via email or via a file sharing service used by your business