

## *Estate Planning*



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## WILLS

**Capture your wishes and ensure that your loved ones benefit.**

A Will is a legal document where an executor administers your estate for the benefit of your chosen beneficiaries.

We recommend that you review your Will every 5 years or earlier with any of the following:

- ensure assets go to spouse
- assets in sole names
- new assets & inheritance
- properly provide for new & existing beneficiaries
- change in relationship: marriage & separation
- asset protection issues
- update your Will to reflect your current wishes



## POWERS OF ATTORNEY

**Appoint an attorney of your own choosing**

Enduring Powers of Attorney allow you to appoint an agent to act on your behalf in regard to legal, financial, medical and guardianship decisions.

- If you lose capacity, your agent can make financial, lifestyle, and medical treatment decisions on your behalf.
- A Financial Enduring Power of Attorney is useful if you travel, during an illness and in old age.







# BENEFITS OF ESTATE PLANNING

Estate Planning is a comprehensive review of all your assets for a tax effective transfer of wealth to your intended beneficiaries.

We provide solutions to help meet your needs and objectives including:

- Income support to spouses, children, and grand-children
- Provision for all of your beneficiaries including those from a second marriage
- Manage inheritance for beneficiaries

## What are the benefits of estate planning?

Peace of mind:

That your current wishes documented.

That you have addressed all the assets of your estate including superannuation, life insurance and trusts.

That you have properly provided for all of your loved ones.

Minimise conflict & keep family harmony by addressing any issues now & making your wishes known to your beneficiaries.

By arranging for an equitable distribution of your estate between family members.

Asset protection of your estate from creditors, relationship breakdown and spendthrift beneficiaries by the use of trusts.

## ABOUT US



Claire Dunning - Principal, AML

Claire Dunning, Solicitor, has over 20 years extensive legal experience in wills, deceased estates, and estate planning.

We will work closely with your advisors to provide premium legal services at a competitive price.

WILLS

POWERS OF ATTORNEY

ESTATE PLANNING

PROBATE

EXECUTOR'S ADVICE