



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 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.