

Wills & Estate Planning Checklist

The Australasian Lawyers Group Pty Ltd trading as Butlers, Barristers & Solicitors

Item No	Item	Yes	No
1.	Do you have a Will?		
2.	If so, have you reviewed your Will in the last 3 years?		
3.	Have you married since you made your Will?		
4.	Have you separated or divorced since you made your Will?		
5.	Do you have any children?		
6.	If so, are any of those children under the age of 18 years?		
7.	Is it possible that you will have further children?		
8.	Do you have any grandchildren?		
9.	If so, are any of your grandchildren under 18 years of age?		
10.	Do you own, or are you purchasing, your family home?		
11.	Do you have any other assets in your own name?		
12.	Do you have any assets in a family trust?		
13.	Do you have any interest in a business?		
14.	Is your life insured and, if so, do you own the policy/policies?		
15.	If not, is there any agreement as to what is to happen to the proceeds of any policy/policies in the event of your death?		
16.	Do you and/or your spouse have any superannuation entitlements?		



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Answered 24 hours

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17.	Do you know what will happen to your superannuation entitlements in the event of your death?		
18.	Will capital gains tax be payable on your estate?		
19.	Do you anticipate receiving any form of social security?		
20.	Would you like to review your existing Will/make a Will?		

WILLS & ESTATE PLANNING CHECKLIST

I would like further information on Wills & Estate Planning.

Name:			
Contact Number:			
Address:			
Suburb:		Postcode:	

Please send me further information on:-	Please Tick ✓
Choosing an Executor	
Duties of an Executor	
Applying for Probate	
Testamentary Trusts	
An Introduction to Discretionary Trusts	

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A Guide to Enduring Powers of Attorney	
Co-Ownership of Real Estate	
Business & Estate Planning and Wills for Western Australian Farmers	
Binding Nominations	
Donees Duties & Obligations	
Mutual Wills	
Estate Planning for Blended Families	

We also have Information Handouts available covering various issues relating to Family Law:-

Please send me information on:-	Please Tick ✓
Family Law Checklist for Settlement of Financial Issues	
Binding Financial Agreements	
Applying for Divorce	
Applying for Spousal Maintenance	

Please return to: Butlers, Barristers & Solicitors
PO Box 460
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or email to: legal@butlers.com.au

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