

## Checklist for Estate Planning

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| What is the total value of your assets including the family home?  |  |
| Who will be your beneficiaries?  |  |
| How will your estate be shared amongst these beneficiaries?  |  |
| Do you have anyone living with you other than your spouse?   |  |
| Do you have a child with disability?   |  |
| Is your child with disability dependent on funding or Centrelink Disability Support Pension?                               |  |
| Is your child eligible for a Special Disability Trust?   |  |
| Do you prefer a family member to be a trustee or a public trustee/ independent trustee?                                    |  |
| Who is your nominated financial planner to be a consultant to the trustee for investment decisions and financial strategy? |  |
| How will your estate be shared these beneficiaries?  |  |
| Do you want to leave part of your estate to a charitable organisation?   |  |
| Who will you nominate as residuary beneficiary, if the main beneficiaries die?   |  |
| Have you made adequate provision in your will for your dependants?   |  |
| Who will you appoint as executor(s) for your will?   |  |
| Do you want to appoint an alternative executor(s) – usually prudent?   |  |
| Do you want to appoint a guardian for your children (also prudent)? Who will this be?                                      |  |
| Do you want to nominate an amount of maintenance for your children?  |  |
| Do you want to give other directions, such as where you would like to be buried?   |  |
| Do you need to consider estate planning? For example, do you   |  |
| Do you want to pass on a family business;  |  |
| Do you have superannuation?  |  |
| Do you want to make a gift to a charity?   |  |
| Do you have capital losses?  |  |
| Do you have property which may be caught by capital gains tax i.e. it was purchased before 19 September 1985?              |  |
| Do you have life insurance?  |  |
| Do you have family debts?  |  |