Estate Planning Checklist

Created: 12/29/2011

# Tasks:

☐ **Communicating your Wishes**

☐ **Do you have a current and valid will?**

☐ **If you have a will have you reviewed it within the last 3 years?**

☐ **Have you named executor(s) and trustee(s)?**

☐ **Do you have an enduring power of attorney?**

☐ **Have you made a nomination in relation to your superannuation?**

☐ **If you have specific wishes regarding your funeral, have you left instructions with your executor?**

☐ **Have you documented your wishes regarding organ donations?**

☐ **Protecting your Family**

☐ **Does your spouse/children/executor know the names and addresses of your professional advisers?**

☐ **Does your will name a guardian(s) for minor children?**

☐ **Does your will provide for children from a previous marriage(s)?**

☐ **If you have dependents with disabilities does your estate plan protect their interests?**

☐ **Do you have the right amount and type of life insurance?**

☐ **Protecting their Inheritance**

☐ **Have you considered setting up a trust to protect your family?s inheritance?**

☐ **Does your estate plan take account of the possibility of someone making a claim on your estate?**

☐ **Does your will protect potential beneficiaries who may face family breakdown or become bankrupt?**

☐ **Do you know what effect your death would have on your self managed super fund, family trust or family company?**

☐ **Other Considerations**

☐ **Have you considered making a planned gift to charity?**

☐ **Do you know what the tax and social security consequences would be for beneficiaries of your current will?**