

ESTATE PLANNING STRATEGIES

The following are only a guide for strategies that may be considered.

ESTATE PLANNING		Relevant?
Possible Strategy	Comments	
Wills in place and current?	Implications of dying intestate or ambiguous Will	Y / N
Powers of Attorney?	If travel or unable to sign documents, who else can	Y / N
Enduring Power Attorney?	If in coma, POA lapses. Who is empowered to act?	Y / N
Advance Health Directive?	To cover wishes if specified medical situations occur	Y / N
Testamentary trust?	Trust will minimise taxation if young family	Y / N
Life interest?	If second marriage, where will surviving partner live	Y / N
Share/Business Purchase?	Buy/sell agreement in place	Y / N
Pre-/Post Nuptial ?	Are agreements desired?	Y / N
CGT rollover provisions?	For significant assets, does Will minimise CGT	Y / N