

Estate Planning

	Per individual	Per couple
Standard Wills These Wills leave estate assets to beneficiaries in their own name, rather than in a testamentary trust (see below). The fee includes: <ul style="list-style-type: none"> • An appointment (telephone call, video conference or meeting at our office) during which our lawyer will provide you with legal advice on all relevant estate planning issues and optimal solutions for passing on your various estate assets to achieve your desired outcome for your beneficiaries; • Our Estate Plan sent after the appointment confirming your instructions. We will also send you an estimate of our fees specific to your requirements at this time; • Preparation of the Wills; • Signing appointment (if required); • Checking to ensure the documents are correctly signed; and • Safe storage of signed documents (if required). 	<i>from</i> \$660*	<i>from</i> \$990*
Wills with Testamentary Trusts These types of Wills enable the beneficiary to take their inheritance in a testamentary trust, offering significant benefits. Please see our Insight on Wills and testamentary trusts for further information. The fee includes: <ul style="list-style-type: none"> • An appointment (telephone call, video conference or meeting at our office) during which our lawyer will provide you with legal advice on all relevant estate planning issues and optimal solutions for passing on your various estate assets to achieve your desired outcome for your beneficiaries; • Our Estate Plan sent after the appointment confirming your instructions. We will also send you an estimate of our fees specific to your requirements at this time; • Preparation of the Wills with testamentary trusts; • An estate planning folder complete with Wills, copies of Wills, an updated Estate Plan, an Advice Paper, a 'plain English' Explanatory Paper, letters for executors and Gift List template; • Signing appointment (if required); • Checking to ensure the documents are correctly signed; and • Safe storage of signed documents (if required). 	<i>from</i> \$1650*	<i>from</i> \$2640*

*Based on a distribution leaving the estate to the partner in the first instance, then children equally (unless pre-deceased then their share to their children equally). If your requirements differ from these, additional fees may apply.

Wills – Additional beneficiary options	Per individual	Per couple
Life Interest or Right to Occupy provisions	\$495	\$750
Education Trust	\$495	\$750
Special Care Trust	\$495	\$750
Special Disability Trust	\$750	\$1100
Forgiveness of Loans clauses for Family Trusts	\$275	\$550
Personalised additional drafting for distribution (if required).	<i>from</i> \$330	<i>from</i> \$330



Enduring Powers of Attorney, Enduring Guardianship, Medical Treatment Decision Maker & Medical Treatment Support Person Documents

The fees are per document. The fee includes:

- Legal advice regarding all relevant issues;
- Drafting of documents and special conditions;
- Summary of appointments and special conditions;
- Signing appointment (if required);
- Checking to ensure the documents are correctly signed;
- Safe storage of signed documents (if required); and
- Provision of certified copies when required.

State/Territory	Combined: Financial, Medical and Lifestyle issues	Financial issues	Guardianship: Lifestyle & Medical issues	Financial & Personal issues	Medical Treatment Decision Maker	Medical Treatment Support Person
ACT	\$360					
QLD	\$360					
SA		\$250				
NSW		\$250	\$250			
TAS		\$250	\$250			
WA		\$250	\$250			
VIC				\$250	\$220	\$110

Deed/Document Reviews, Variations, Loan Agreements

Superannuation – Binding Death Benefit Nomination Review	\$220 ea
Family Trust Deed Review	\$220 ea
Family Trust Deed Variation	from \$660 ea
Loan Agreement - unsecured	from \$1320
Loan Agreement - secured	from \$1650

Property transfer (spouses/partners) related to Estate Planning (VIC only)

Property Transfer (<i>plus disbursements, duty, registration fee</i>)	\$825
Property Transfer where existing mortgagee's consent required (<i>plus disbursements, duty, registration, mortgagee consent fees</i>)	\$POA

TERMS

- All prices include GST, are current as at 18 July 2023 and are subject to change without notice.
- Payment is required for all work prior to release of documents.
- Payment options – cheque, direct transfer credit or credit card (excluding AMEX).