BALANCED INVESTMENT STRATEGIES

FINANCE ◆ BALANCE ◆ LIFE

ESTATE PLANNING CHECKLIST

		Yes	No	Unsure	N/A
Communicating your wishes					
1	Do you have a current and valid Will?				
2	If you have a Will have you reviewed it within the last 3 years?				
3	Have you chosen a suitable executor?				
4	Do you have an Enduring Power of Attorney?				
5	Have you made a nomination in relation to your superannuation – either to your dependant(s) or to your estate?				
6	If you have specific wishes regarding your funeral, have you left instructions with your executor?				
7	Have you documented your wishes regarding organ donations?				
Protecting your family					
8	Does your spouse/children/executor know the names and addresses of your professional advisers?				
9	Is your family adequately protected in the event of you death of disability?				
10	If you have children under 18, does your Will name a guardian?				
11	Does your Will provide for children from a previous marriage(s)?				
12	If you have dependents with disabilities does your estate plan protect their interests?				
Protecting their inheritance					
13	Have you considered setting up a Trust to protect your family's inheritance and manage tax consequences?				
14	Does your Estate Plan take account of the possibility of someone making a claim on your estate?				

Balanced Investment Strategies Pty Ltd
A.B.N. 33 070 860 776 AFSL No. 314365
5 Sixth Ave PALM BEACH QLD 4221
ph. (07) 5598 3800 fax. (07) 5598 3711 email. BIS.info@cosgroveco.com.au

15	Does your Will protect potential beneficiaries who may: (i) face family breakdown; (ii) become bankrupt; (iii) hold company directorships; or, (iv) be partners in a professional practice?				
16	Do you know what effect your death would have on your Self Managed Super Fund, Family Trust or Family Company?				
Other considerations					
17	If you would like to make a charitable gift, have you considered all the options?				
18	Do you know what the tax and social security consequences would be for beneficiaries of your current will?				
19	What would happen to your business in the event of your death?				