



# Estate Planning Checklist

Client Name(s): \_\_\_\_\_

	Yes	No	Yes	No
1 Would your family maintain control in the event of your death?				
2 Do you have a valid Will?				
3 Does it provide for a Testamentary Trust?				
4 Do you have an Enduring Power of Attorney?				
5 Have you appointed Guardians for your children?				
6 Is your estate likely to be challenged?				
7 Are you likely to receive an inheritance?				
8 Will your estate be sufficiently funded?				
9 Will estate liabilities be paid out?				
10 Does your superannuation compliment your estate plan?				
11 Are your superannuation beneficiary nominations appropriate?				
12 Have you considered who will take control of your companies or Trusts?				
13 Do you have any beneficiaries with special needs ie physical or mental disability?				
14 Are you in business with other people?				
15 Do you know where your important documents are located?				

### Additional Issues

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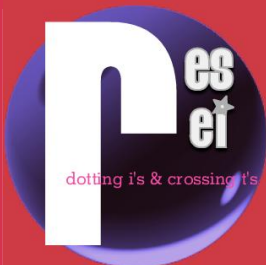
### Additional documents

The following additional documents accompany this form eg existing Wills, Trust Deeds, etc.

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