

DECISION MAKING EVALUATION (MEDICO-LEGAL)

Fee estimate

(incl. GST and out-of-pocket expenses)

Type of Service

Each service description below is an indicative scope of work subject to professional review of each client's presenting situation
Please let us know if there are any absolute budget limits to any case or matter we undertake for you

□ Initial estate situation consultation

- Not exceeding one hour by audio or audio visual link such as Zoom or Microsoft Teams with a single legal or neuropsychology professional. This will be based on the initial referral briefing provided before the consultation and will include the provision of feedback notes from the professional summarising the outcomes of the consultation

\$625

(Median fee \$625)

□ Medico-legal decision making evaluation and written feedback report

- Up to 2 hours medico-legal consultation appointment for 2 professionals including the opportunity for the client, as well as any accompanying family members or supporters, to discuss the client's objectives
- Includes a written **Feedback Report** outlining the primary findings and advice of our multidisciplinary medico-legal client services team, and where appropriate, commentary covering any follow-on matters requiring resolution
- Further work is completed at our normal hourly rates.
- No Medicare rebate is currently available. Contact us if it will be paid for you by the Department of Veteran Affairs, WorkCover, insurer or other organisation

\$1600

□ Straightforward informed consent cases, involving structured document drafting, witnessing and attestation

- Applies to an estate that is personally owned, not other structures. Covers evaluation, witnessing or attestation of documents prepared by others
- Wills involving simple direct gifting
- Covers provision of a power of enduring guardianship, generic power of attorney, and a generic limited superannuation benefit succession evaluation

3 to 6 hours to complete

\$900 to \$1800

Including client meetings, estate situation review and attestation evidence documentation as appropriate to task.

□ Complicated* decision or diagnosis evaluation cases

- Aged care transition
- Withdrawal or consent to medical treatment
- Informed consent to financial advice
- Attorney or guardian decision evaluation
- Litigation for competence evaluation
- Powers of appointment activation or review

5 to 12 hours to complete

\$2,000 to \$4,800

□ **Complex* family or estate governance evaluation cases**

- Evaluation of estate structures and wealth conservation or succession
- Multi-jurisdiction estate management evaluation
- Conflict management, governance, compliance or dispute resolution

12 to 30+ hours to complete

Estimate provided after an initial situation review and formal work plan. For any phased quotation or ongoing support pricing is project, event or activity-based

Multidisciplinary medico-legal client service team



Michael Perkins
Principal Lawyer
\$550 hourly rate (incl. GST)

With over 35 years' experience, Michael's expertise in trusts, estates and private practice has helped families across generations to preserve and manage their wealth, family and community connections. As well as helping clients with family, business and wealth and succession interests, he is an expert in dealing with the challenges of corporate growth, asset protection, estate administration and succession.



Dr Jane Lonie
Associated Clinician
\$550 hourly rate (incl. GST)

With over 20 years' experience in the assessment, management and research of cognitive dysfunction in adults and older adults, Jane works closely with Michael to ensure you, your family and your business interests age well. She provides autonomy assessments and supported decision making methodologies and provides expert medico-legal opinion to the courts on legal capacity.

- More than one member of the firm will only be involved to the extent appropriate for the work

*Factors to consider for straightforward, complicated or complex cases

Various matters can make your case *complicated and complex*, rather than *straightforward*.

In review of the specific circumstances of each client a range of care pathway options can arise and even change over the course of a case. For each client's matter or case a simple situation arises when one right answer exists for the presenting facts. However most client situations involve more complexity. They involve advice on possible alternative care pathways and any associated risks. This then presents options and choices to be made by our clients after they are explained, considered and discussed.

From that, a structured workflow is proposed for each client to make informed choices when a case emerges as involving a *complicated or complex* situation.

This Price Guide sets out estimates only. As we review and understand your case, in consultation we will discuss with you factors affecting your situation. Where necessary we will review and revise fee estimates as necessary. Factors affecting fee estimates can include those below.

- A proposal to appoint a financial manager for a client
- A client's domicile and residence being other than Australian
- Complex or complicated questions or objectives presented by a client
- A client's central management and control or citizenship located outside Australia
- Complex medical condition or morbidities affecting a client's decision making ability
- Whether a vulnerable client can be an estate beneficiary or manage their welfare
- A client in a blended family situation, eg a family with children from prior relationships



Photo credit: Tim Robinson