

HAVE YOU MADE ESTATE ADMINISTRATION DOCUMENTS BEFORE? WHERE ARE THEY?

Clients move, lawyers move and documents tend to stay in someone's safe or drawer. From time to time, you should check the documents we hold for you and whether any changes need to be made to their terms.

If any of the following has occurred since you last prepared your estate administration documents, you may require an update.

Let us know how we can help you keep your estate administration arrangements current and appropriate to your ongoing intentions.

Have you:

- Gotten married, divorced, started a de-facto relationship or separated from your spouse?
- Had one or more children?
- Changed your name?
- Changed your main residence?
- Become bankrupt or otherwise have solvency concerns?
- Started a business or a high-risk occupation or become a director or manager of any commercial enterprise?
- Acquired or established any form of digital assets including cryptocurrency?
- Invested in or acquired assets located outside your home jurisdiction?
- Entered into a binding financial agreement before, during or at the end of a relationship?

Have any of the beneficiaries in your will:

- Changed their name?
- Gotten married, divorced, started a de-facto relationship or separated from their spouse?
- Moved overseas or back to Australia from overseas?
- Reached financial maturity?
- Lost the ability to manage their affairs or become financially irresponsible?

- Become estranged from you?
- Passed away?
- Developed any special needs or disabilities?
- Become a recipient of social security benefits?
- Become bankrupt?

Have any of the people nominated to a decision-making role (e.g. executor, trustee, attorney, guardian):

- Changed their name?
- Moved to another jurisdiction?
- Lost the ability to take on the role?
- Passed away?
- Become bankrupt?
-
- Married or established a domestic relationship with a foreign person?

Other matters to consider:

- Has the relationship between any joint executors, trustees, attorneys or guardians changed so that it is no longer workable?
- Has the size of your estate significantly increased or decreased?
- Have you disposed of any specific gifts in your Will?
- Have you acquired assets jointly with a spouse or third party?
- Have you received an inheritance?
- Did you make any loans or gifts to family members, friends or third parties?
- Have you established any new companies, trusts, partnerships, or a self-managed superannuation fund?
- Have you entered into an agreement with a third party which could affect your estate plan e.g. buy-sell agreements or partnership agreements?
- Have you changed your superannuation arrangements?

- Did you start a revisionary pension for your super?
- Have you changed your life insurance arrangements?
- Are you worried that someone could challenge your estate planning arrangements?

Call us on 1300 412 282 or contact us through our online channels at www.autonomyfirst.com to set a time for us to call or meet.

We do house calls and consult by Zoom or Microsoft Teams. How best can we help you?