

Estate Planning

	Per single (inc gst)	Per couple (inc gst)
<p>Standard Wills</p> <p>These Wills leave estate assets to beneficiaries in their own name rather than in a testamentary trust (see below).</p> <p>The fee includes:</p> <ul style="list-style-type: none"> • Our information insights, sent to you before the interview; • A telephone call (or meeting in our office if you prefer) during which our lawyer will advise you on all relevant estate planning issues including optimal solutions for passing on your various estate assets; • Our Estate Plan sent after the interview confirming your instructions; • Preparation of the Wills; • Checking to ensure the documents are correctly signed; and • Safe storage of signed documents if required. 	\$660*	\$990*
<p><i>*Based on a straight-line distribution which means the estate is left to the partner in first instance, then children equally (unless pre-deceased then their share to their children equally). If your requirements differ from these we will provide you with a costing before we proceed.</i></p>		

	Per single (inc gst)	Per couple (inc gst)
<p>Wills with Testamentary Trusts</p> <p>These Wills provide more comprehensive solutions than standard Wills. Whether these are more appropriate for you will depend on your assets and family scenario. The lawyer will discuss this with you in the interview to help you decide which option is best for you. Generally, these types of Wills enable the beneficiary to take their inheritance in a testamentary trust, offering significant benefits.</p> <p>The fee includes:</p> <ul style="list-style-type: none"> • Our information insights, sent to you before the interview; • A telephone call (or meeting if you prefer) during which we advise you in relation to all relevant estate planning issues including optimal solutions for passing on your various estate assets; • Our Estate Plan sent after the interview confirming your instructions; • Preparation of the Wills with testamentary trusts (and Powers of Attorney if requested); • An estate planning folder complete with Wills, copies of Wills, an updated Estate Plan, a client-specific Advice Paper, a 'plain English' Explanatory Paper, letters for executors, Gift List template, and Powers of Attorney (if requested); • Checking to ensure the documents are correctly signed; and • Safe storage of signed documents if required. 	from \$1650*	from \$2640*
<p><i>*Based on a straight-line distribution which means the estate is left to the partner in first instance, then children equally (unless pre-deceased then their share to their children equally). If your requirements differ from these we will provide you with a costing before we proceed.</i></p>		

Wills with Testamentary Trusts – Additional beneficiary options if chosen		
	Per single (inc gst)	Per couple (inc gst)
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 non-straight line distribution (if required) - if required.	\$330 per hr	\$330 per hr

Deed Reviews & Variations & Loan Agreements	
Family Trust Deed Review	\$220 ea
Family Trust Deed Variation	from \$660 ea
Loan Agreement - unsecured	from \$880
Loan Agreement - secured	from \$1650

Enduring Powers of Attorney, Enduring Guardianship & Medical Treatment Decision Maker & Support Person Documents						
The fees* include legal advice, drafting of documents, summary of appointments and special conditions, signing instructions, checking that returned documents are correctly signed, witnessed, and dated, storage, and provision of certified copies when required.						
State or Territory	Combined	Financial issues	Financial & Personal issues	Guardianship: Lifestyle & Medical 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

*Fee per document

Property transfer (spouses/partners) related to Estate Planning	
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>)	\$1320

*No stamp duty on transfer between spouses of principle place of residence in Vic. For other states please check with lawyer.

TERMS

- All prices include GST, are current as at 21st March, 2018 and are subject to change without notice.
- Payment is required for all work prior to despatch of documents
- Payment options – cheque, direct credit or credit card (Visa and MasterCard only)