

# **ROBINSON GILL.LAWYERS**

*Estate Planning  
Putting it all together and  
getting it right from the start.*

**Presenter – Julie Chambers, Lawyer.**



# Wills – things to consider.....

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Do I have a will?

Does my will need updating?

Where is my original will stored?

Is my will even valid?





# Does this sound like someone you know?

- Blended families – different asset structures and their treatment in estates.
- Different estate interests – spouses, children and step children
- Is everyone properly provided for in the Will?
- Different treatment of assets upon death – jointly assets and assets held in sole names.



# What type of will do you need?

- ❖ Is a simple Will Sufficient?
- ❖ Do you need a testamentary trust?
- ❖ Does my Will provide for changes to my assets?
- ❖ Help - what do I do next?





# What do I need to consider when preparing or reviewing a will?

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- Who are the executors?
- What is the current ownership structure of your assets?



- Do you have foreign assets?
- Have you made loans to children during your lifetime that need to be equalised in your Will?
- Do nay beneficiaries have special needs/considerations?
- What about tax?

# What if I don't have a Will in place?

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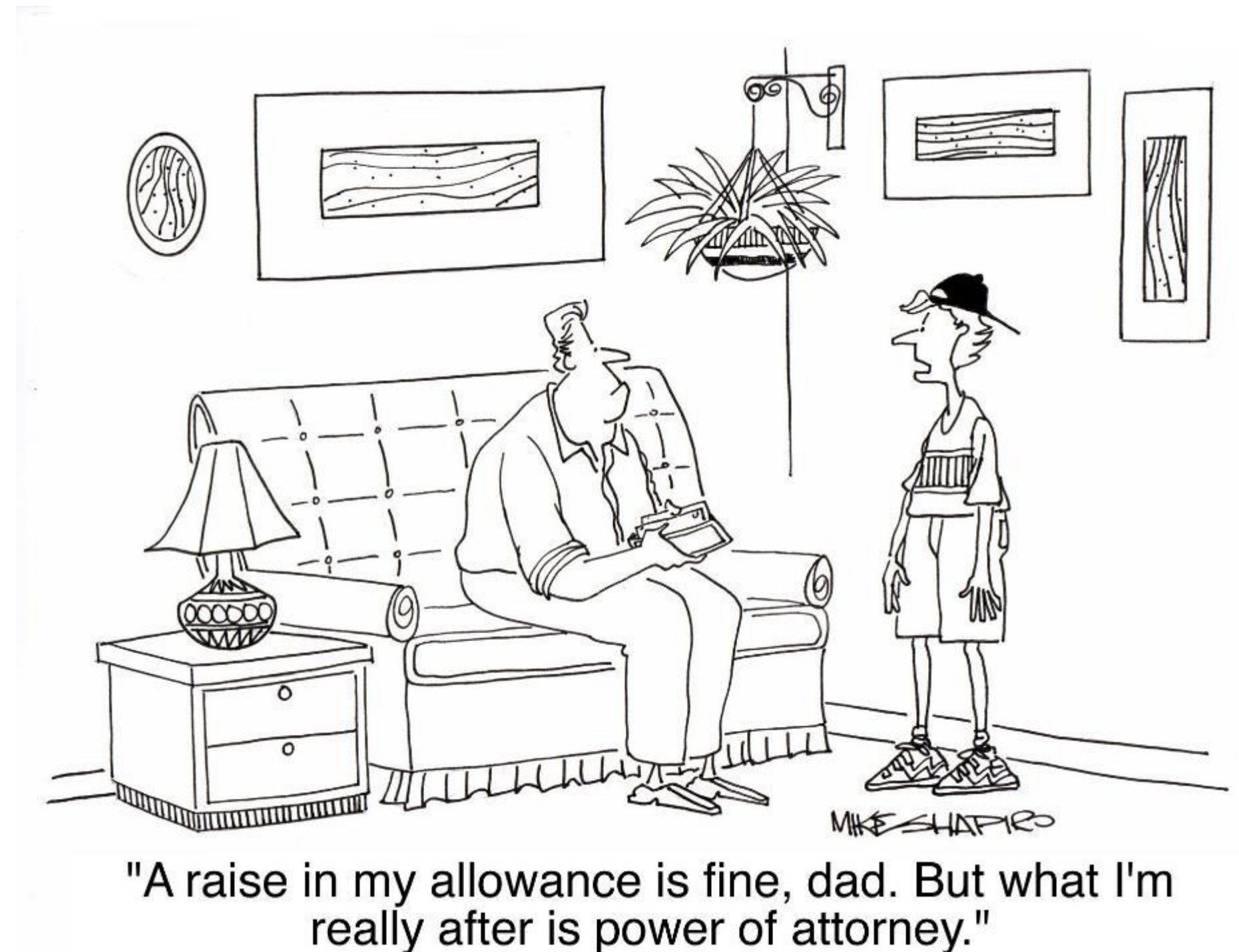


- ☐ I don't have a Will - Who gets my estate?
- ☐ Will my spouse/partner be protected?
- ☐ Are my children protected?
- ☐ What happens next?
- ☐ How will it all work when I die?



# Why do I need Powers of Attorney?

- ❖ Enduring Powers of Attorney
- ❖ Medical Treatment Decision Maker Documents
- ❖ Advanced Care Directives
- ❖ VCAT





# Stories from the trenches.....

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Don't leave  
everything until it's  
too late  
or it probably will  
be!

...Sketa