



ADLV LAW

FIERCELY ON YOUR SIDE

SOLUTION BRIEF

Why you need to think about Estate Planning

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01

Questions to ask yourself

Take a few minutes out to ask yourself the following important questions:

- Do you want to choose who benefits from your wealth, and when?
- Do you want to protect the wealth you give your children from unjust claims?
- Do you want to make sure your children only receive wealth as and when they are mature enough to handle it constructively?
- Do you want to ensure your family's wealth remains available to support your children, even if your spouse re-partners?
- Do you want to minimise taxes on the assets that you leave your partner and children?
- Do you want to smoothly pass control of your business and investment structures to the next generation (such as superannuation, family trusts and private companies)?
- Do you want to minimise the costs of administering your wealth when you die?

02

What estate planning ensures

Estate Planning is the process of ensuring that:

- You have a clear understanding of the legal structures through which you hold and control your wealth;
- You have appropriate strategies in place to ensure your wealth is there to support your family when you die;
- Your children are adequately provided and cared for by people they know and trust; and
- There is a smooth transition of control over your legal structures.

03

Our process

We follow a simple and logical process:

- First, we identify your objectives (through our comprehensive "Fact Find");
- Then we provide you with clear recommendations as to how to achieve your objectives, together with a fixed quote of what we will charge;
- Next, we promptly implement our recommendations; and
- Finally, we keep in touch and offer a periodic review.



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TALK TO US

What next?

If you would like to speak to someone about your Estate Planning, call us on 1300 654 590 or email us at wehelp@adlvlaw.com.au.

Further information can also be found on our website at www.adlvlaw.com.au.

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