ESTATE PLANNING D N A
Effective Legacies™

ESTATE PLANNING DNA
7 STEP EFFECTIVE LEGACY PROCESS™

Discovery Meeting - *Where are you now?*
- Identify the risks
- Identify current reality
- Identify the succession vision
- The 3 C's of Succession™
- Business and personal overview
- Values and legacy discussion
- Suface diagnostic
- Authority to proceed
- Timeline

Research & Evaluation - *Current arrangements*
- Asset ownership
- Trust arrangements/succession
- Company/unit trust details
- Asset Wills & Living Wills
- Estate/succession funding
- Asset protection measures
- Exit strategies
- Superannuation nominations

Delivery of Advice - *Positioning*
- Estate Planning Outline (overview of legacy distribution strategy and appointments).
- Risk Evaluation
- Confirmation of vision
- Confirmation of all current and Estate Planning components
- Funding & protection strategies
- Succession/distribution strategies & appointments
- Summary of legal documentation

Implementation - *Putting the plan into action*
- Preparation of draft documentation e.g Wills, Enduring Powers of Attorney and Living Wills
- Trust documentation/amendment
- Superannuation beneficiary nominations
- Funding Protection Strategies (as required)

Plan Consolidation - *All elements integrated*
- Final amendments to Wills/Succession agreement
- Living Wills
- Explanatory documentation
- Funding arrangments/adjustments
- Merging of strategies
- Compliance/best practice check

Summary & Ceremony - *The final touches*
- Document signing
- Estate Directory/Succession Manual
- Executor Certificates
- Document Storage
- Presentation & Ceremony
- Feedback of your experience
- Funding Schedules

Establish Review Procedure - *Keeping things relevant & working together*
- Create timelines for review
- Communication process
- Referral of services