



ESTATE PLANNING CHECKLIST

Concerns	Yes	No
Current documents – do you have:		
An up-to-date Will		
Up-to-date Powers of Attorney		
Funding – in the event of your death, do you have:		
Adequate assets/funds to pay off debts		
Adequate assets/funds to provide for dependants and loved ones		
Beneficiaries – I want my estate plan to provide for:		
My spouse/partner and children		
My blended family and/or extended family		
Restricted beneficiary access to their inheritance until an appropriate age		
Beneficiaries with disabilities and/or special needs		
The education of my children		
The education of my grandchildren		
Charitable causes		
Guardians of children		
Estate Protection – I want to address:		
Any possible challenges to my Will		
Possible challenges to the payment of my superannuation death benefits		



Concerns	Yes	No
The risk of beneficiary relationship breakdown or divorce		
Beneficiary business risk		
Beneficiary risk of bankruptcy		
Beneficiary spendthrift/addictions issues		
Other beneficiary vulnerabilities		

Superannuation – I want to address:

My understanding of what happens to my superannuation on death		
Updating my beneficiary nomination for my superannuation benefits		
SMSF – updating the superannuation fund deed		
SMSF – my understanding of trustee succession on death or incapacity		

Business and Related Structures – do you have:

Arrangements for business succession on death		
Documents to confer control and succession of any family trust on death		
Documents addressing any company succession and ownership on death		

Asset Protection – have you addressed:

Your personal business risk or other risks		
Protection of personal assets against potential business or other risks		
Ownership of assets in appropriate legal structures		