

# ESTATE PLANNING CHECK LIST

## WHAT YOU'LL NEED FOR YOUR ESTATE PLAN

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Our checklist can help you start thinking about your options for your will and other estate planning choices. It can also be really useful for guiding conversations with your partner and other family members about what you'd want to happen when you die.

### FORMS AND LEGAL DOCUMENTS

#### 1 YOUR WILL

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This is a legal document setting out how your assets will be distributed when you die. It can also set out your wishes regarding the care of your minor children as well as who you choose to be your executor when you pass away. For your will to be legally binding it must be properly executed and witnessed according to the laws for your state or territory.

#### 2 BENEFICIARY NOMINATIONS

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Your super and any benefits from a life insurance policy are generally not included in your will. As part of your estate plan, you'll need to choose the people you want to have this money when you die and let your super fund and insurance policy provider know who they are.

Find out more about who you can choose to receive your super death benefit or [log in to nominate a beneficiary now](#).

The person/people I'd like my super and life insurance to go to (my beneficiaries) are...

#### 3 POWER OF ATTORNEY

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A power of attorney allows you to give legal authority to another person/people to act on your behalf. There are two types of power of attorney – one to make choices about your medical and personal affairs if you're unable to do this for yourself, and one to look after your legal and financial matters. Medical and financial powers of attorney are called different names depending on your state or territory.

The person/people I'd like to look after my financial matters if I'm unable to do so myself are...

The person/people I'd like to look after my personal and medical affairs if I'm unable to do so myself are...

## CHOOSE YOUR PEOPLE

As well as your beneficiaries and power of attorney you'll also need to think about who will act as executor for your will and look after your children if you have any.

### 1 EXECUTOR

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This is the person – or it can be an organisation – who will carry out the directions in your will. They take responsibility for the disposal of your body; making the necessary court application for probate; calling in your assets; paying your outstanding debts and taxes; and distributing your estate in accordance with your wishes. Your executor will communicate with your beneficiaries and will also be responsible for dealing with issues that may arise if there are any disputes.

The person/people I'd like to carry out directions in my will are...

### 2 GUARDIAN(S)

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Your will can include legal guardianship arrangements for children who are under 18 when you die. Their guardian(s) will be responsible for day-to-day care as well as making important decisions about their education, health and wellbeing.

The person/people I'd like to care for my children are...

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**LOOKING FOR HELP WITH YOUR ESTATE PLAN? YOU CAN SPEAK TO  
YOUR FINANCIAL ADVISER IF YOU HAVE ONE OR YOU COULD SEARCH  
FOR AN ESTATE PLANNING LAWYER TO HELP YOU.**

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