



HARRIS FREIDMAN  
LAWYERS

## **Your initial estate planning appointment**

### **What to Bring**

If possible, please bring the following documents and information to your initial appointment with us:

1. A copy of any of your existing or previous wills;
2. A list of assets which you own or control;
3. A list of liabilities;
4. Details of your family members and other dependants, including full names, addresses and dates of birth;
5. Details of proposed beneficiaries, including full names, address and dates of birth;
6. Names and contact details of your Accountant/Financial Advisor/Superannuation Advisor;
7. Details of proposed executors;
8. Details of proposed guardians;
9. Details of your life insurance (please bring a copy of your last statement if possible);
10. Details of your superannuation entitlements including any nominated beneficiary;
11. Details of any family or private company in which you are a shareholder or officer;
12. Details of any family trusts; and
13. Details of any partnership in which you are engaged;

Having these details at the outset will allow the instructions to be taken efficiently and help us to assist you in the most appropriate way.

Some additional information and documents which we may ultimately require (although these items are not essential at our initial appointment with you) include:

1. In respect of superannuation entitlements:
  - (a) Where your benefits are held in a self-managed superannuation fund:
    - (1) a copy of the superannuation fund trust deed;
    - (2) a copy of the most recent financial statements for the fund; and
    - (3) a copy of any binding or non-binding death benefit nomination.
  - (b) Where your benefits are not held in a self-managed superannuation fund:
    - (1) the full name and address of the fund and your membership details;
    - (2) a copy of the most recent member benefits statement; and
    - (3) a copy of any binding or non-binding death benefit nomination.
2. In respect of any family or private company:
  - (a) an outline of any corporate structures which own or control any family assets;
  - (b) a copy of any company constitution;
  - (c) a copy of the most recent ASIC return for each company; and
  - (d) a copy of the most recent financial statements for each company.
3. In respect of any family trust:
  - (a) a copy of the family trust deed; and
  - (b) a copy of the most recent financial statements for the trust.
4. In respect of any partnership in which you are engaged:
  - (a) a copy of any partnership agreement;
  - (b) details of the other partners and the extent of their interests; and
  - (c) a copy of the most recent financial statements for each partnership.