

Estate Planning Checklist

Wills, Trusts & Avoiding Family Disputes

A solid estate plan gives you peace of mind and helps protect the people you care about most. Use this checklist to make sure you've covered the essentials.

Will

- ☐ I have a legally valid and up-to-date Will.
- ☐ My Will clearly names executors, beneficiaries, and guardians (if needed).
- ☐ I've reviewed or updated my Will after any major life change (e.g., marriage, divorce, new children, or new assets).
- ☐ I've communicated the broad contents of my Will with key family members or advisers.

Trusts (if applicable)

- ☐ I've considered using a testamentary trust or family trust for:
 - Minors or dependants with special needs
 - Tax-effective wealth distribution
 - Asset protection from divorce or bankruptcy
- ☐ Any existing trusts are legally established and professionally managed.

Superannuation

- ☐ I've checked whether my super death benefit nomination is:
 - Current
 - Binding (not just non-binding)
 - Assigned to the person I intend
- ☐ I understand that super may not be covered by my Will unless nominated correctly.

Powers of Attorney & Guardianship

- ☐ I have an Enduring Power of Attorney for financial/legal decisions.
- ☐ I have an Enduring Power of Guardianship for personal/medical decisions.
- ☐ I have an Advance Health Directive outlining my treatment preferences.

Communication

- ☐ I've spoken to my family or beneficiaries about my wishes.
- ☐ I've documented reasons for unequal or complex distributions (if applicable).
- ☐ I've stored my estate planning documents securely and told someone where to find them.

Review Timeline

- ☐ I review my estate plan every 2–3 years, or after any major life event.
- ☐ I work with my financial adviser and legal team to keep everything aligned.



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