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| **Question** | **Response** | **Action required****Y / N** |
| **Personal** |  |  |
| Is there a current will in place and when was it last reviewed. |  |  |
| Who will care for your children if you and or your wife pass away? |  |  |
| How have you provisioned for the care of your children if you were to pass away while they were minors? |  |  |
| What age should your children be before they inherit your estate? |  |  |
| If your estate had to be managed for some years before the assets pass to your children who will be the trustee? |  |  |
| Who is the executor of your estate and are they aware of your wishes? |  |  |
| Does anyone hold an enduring power of attorney for you? |  |  |
| Do you have binding death benefit nominations in place for your superannuation? |  |  |
| Are you a beneficiary or a potential beneficiary of another estate? |  |  |
| Are any of the potential beneficiaries under your estate in relationships? |  |  |
| Outside of your immediate family is there anyone who could have a financial dependency claim on the estate? |  |  |
| Have you made or are you considering any charitable bequests? |  |  |
| Have you contemplated your position if you lost capacity? |  |  |
| Financial |  |  |
| Do you hold assets that are not included in your Estate? |  |  |
| Have you broadly segmented your assets between those that will be dealt with by your estate and those that are outside of your estate? |  |  |
| Does your will allow for assets that will be dealt with outside of your estate? |  |  |
| Are you counting assets in your estate that may be joint assets e.g., joint bank accounts? |  |  |
| Do you have an asset register for CGT purposes? |  |  |
| Does debt or contingent liabilities have a possible impact on your estate? |  |  |
| Do you have a schedule of insurance policies in place, including who the beneficiaries are? |  |  |
| Will there be any CGT issues in realisation of assets by the estate? |  |  |
| Does any allowance need to be made for contingent CGT liabilities in assets to be passed through your estate? |  |  |
| Planning |  |  |
| Would the use of testamentary trusts be advantageous to yourestate? |  |  |
| Are there any assets that you intend to distribute in specie? Will this cause any issues in meeting your broad distribution wishes? |  |  |
| Are there assets in your estate such as a business, property or farm that needs to continue after your death and if yes have you considered who the trustee should be? |  |  |
| Do you have any business assets where a change of control in the underlying entity could trigger adverse business and financial outcomes? |  |  |
| Are there any binding agreements that you are party to e.g., shareholder agreements? |  |  |
| Are there assets where ownership should either be restructured or distributed in advance of the estate? |  |  |