



Estate Planning



Business & Estate Planning Specialists provides a facilitation service to ensure your estate planning requirements are completed with a specialist law firm. The benefit to you is all your estate planning needs can be met without the need to take time out to attend a solicitor for 3 meetings (discussion & instructions, review and then signing).

With BEPS, you simply complete the Instruction Document. From there, your legal documents are designed and provided to you for signing. BEPS also has a qualified Commissioner for Declarations available, so your documents can be legally completed. BEPS can also hold your signed documents in our fire-proof safe.

It is a simple, efficient process to ensure you have your estate planning needs sorted!

Will – a Will is a legal document stating how you would like your assets to be distributed when you die, and the person (or organisation) you would like to be responsible for carrying out your wishes. Wills must be signed correctly to be valid. Wills can range from being very basic (at least one is in place!) to a more comprehensive Will which contains provisions for a Testamentary Trust.

Testamentary Discretionary Trusts (TDT) – the legal firm we utilize provides a 3 Generation Testamentary Trust. The Trust comes into existence on your death and is set up for the benefit of your nominated beneficiary/ies. The Trust can operate for 3 generations – your partner/spouse, children and grandchildren. Testamentary Trusts can be an effective vehicle to protect assets, save tax and distribute tax effective income. They are a must if you have a reasonable sized estate, if you have children and if you would like to protect your partner/spouse.

Enduring Power of Attorney (EPOA) - Financial - is a legal document that allows you, the person giving the POA, to appoint a person/s to make decisions about your assets, such as real estate and bank accounts.

Enduring Power of Attorney (EPOA) - Health & Lifestyle - is a legal document that allows you to appoint a person/s to make decisions about your personal lifestyle, where you live and medical treatment – when you have lost capacity to do so.

Letter of Wishes (LOW) – is a document providing guidance to your Executor &/or Trustee. The document is held with your Will, and is helpful – as it covers a range of issues not normally contained in your Will.

Pricing (GST inclusive)	Single
Will (incl TDT), EPOA, LOW	\$1,650
Will (No TDT), EPOA, LOW	\$550
Comprehensive package with GOTO meeting online with Lawyers	\$2,750

Pricing (GST inclusive)	Couple
2* Will (incl TDT), 2* EPOAs, LOW	\$2,750
2* Wills (No TDT), 2* EPOAs, LOW	\$1,100
Comprehensive package with GOTO meeting online with Lawyers	\$4,390