

THE ESTATE PLANNING PROCESS

There are few things more important than having your affairs in order. Death can strike at any time. Peace of mind comes from knowing that your estate planning is in proper order, and that your wealth will be passed on and protected as you intend.

What is Estate Planning?

Estate Planning is far more than just making a simple Will. It can involve a range of issues such as:

- The succession of other entities (such as companies or trusts) that you may control;
- How best to handle your superannuation entitlements upon death;
- Calamity provisions to deal with the simultaneous death of multiple family members;
- Powers of Attorney, should you lack capacity to make your own decisions;
- Testamentary Trusts to provide certainty and tax-effectiveness for young adults and minor children;
- Asset protection strategies to guard against challenges to your Estate;
- Strategies to minimise the risks faced by a surviving spouse re-partnering in the future and losing control of the wealth;
- Guardianship decisions over minor children;
- Careful consideration of who your executors should be in the event of your death;
- Ensuring that any Business Succession Planning Objectives are congruent with your Estate Planning objectives.

What is the role of PT Partners?

Through a deep understanding of the personal and business structures of our clients, PT Partners is perfectly positioned to bring about Estate Planning outcomes that are sound, tax-effective and tailored to the specific requirements at hand.

We centralise and facilitate the entire process, drawing on our trusted Advisor Network in Estate Planning Law for the drafting of the legal documents that are required.

Next steps?

The best way to start the process is through a Planning Meeting with our director, Darren Hagarty, who specialises in estate and business succession planning. This meeting allows us to explore the possibilities with you and identify where the gaps lie in your estate planning affairs.

The Planning Meeting is at a fixed price of \$330.

Following the meeting, we'll put together for you a fixed price quote for the work that needs doing.

For further information, please contact Darren Hagarty on (07) 3808 4499 or at darren@ptpartners.net.au, or to make an appointment with Darren, simply go to our [online booking facility](#).