

DON'T RISK MISSING YOUR ULTIMATE DEADLINE

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5 The 5 stages

Stage 1: Fact find

Detailing your assets, liabilities & relationships.

- Your **family, beneficiaries** & their **relationships**
- **Personal** and **non-personal** assets

Stage 2: Loss of capacity

Planning for your loss of capacity.

- **Power of attorney**
- **Enduring guardian**

Stage 3: Beneficiaries

Deciding who gets what and when.

- **Age** and **stage** of inheritance?
- **Spouses** included or **bloodline** only?

Stage 4: Tax and risk

Deciding how to structure your estate plan.

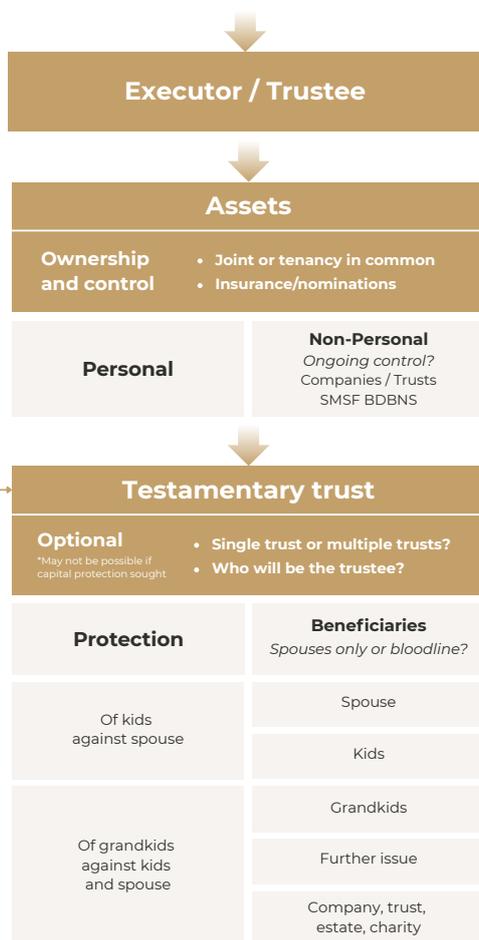
- Do you want a **testamentary** trust?
- Do any of the **7 risks** apply to you?

Stage 5: Housekeeping

Making sure your estate plan actually works.

- **Align** entities, documents and asset control with your plan.
- **Revisit your plan** regularly, especially if your life changes.

Willmaker



? Things to consider

7 x Rules

E.A.T.S.T.Y.R

7 x Risks

- 1 - Spendthrift**
→ **Select** the trustee
- 2 - Special needs (Disability)**
→ **Select** the trustee & gift over
- 3 - Special needs (DAGS)**
→ **Select** the trustee
- 4 - Bankruptcy**
→ Trustee **control**
- 5 - Betrayal**
→ Mutual wills
→ **OR** independent trustee
→ **OR** limited capital rights
- 6 - Divorce - Family Law**
→ BFA
→ **OR** independent trustee
→ **OR** limited capital rights
→ **OR** single trust
- 7 - Death - a contested will**
→ Control
→ **OR** independent trustee
→ **OR** limited capital rights