

FIRST MEETING CHECKLIST

HEAD AND HEART ESTATE PLANNING



EIGHT QUESTIONS YOUR LAWYER WILL ASK IN YOUR FIRST MEETING

Knowing the answer to these questions will greatly impact your lawyer's advice and strategy. To get the best value from your first meeting check the answers for these things for yourself ahead of time!

HOW DO YOU OWN YOUR PROPERTY?
SOLELY, JOINT PROPRIETORS, OR TENANTS IN COMMON (A COPY OF THE CERTIFICATE OF TITLE IS GREAT TO SEND TO YOUR LAWYER).

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WHAT IS YOUR PROPERTY VALUE? WHAT IS YOUR LOAN?
AN EDUCATED GUESS OF THE VALUE IS FINE.

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HOW YOUR BUSINESS (IF ANY) IS STRUCTURED?
AS A SOLE TRADER, COMPANY, TRUST, OR ANY OTHER WAY

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THE LEGAL DETAILS OF YOUR COMPANY OR TRUST?
A COPY OF THE TRUST DEED, AND ASIC COMPANY EXTRACT ARE BEST

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YOUR SUPERANNUATION ACCOUNT BALANCE & FUND/S

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YOUR LIFE INSURANCE VALUES & THE INSURER/S

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PAST RELATIONSHIPS: SEPARATED OR DIVORCED?
DO YOU HAVE PROPERTY SETTLEMENT ORDERS?

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WHO DO YOU SUPPORT OR RELY ON FINANCIALLY?
ESPECIALLY IF THEY ARE NOT IN YOUR IMMEDIATE FAMILY

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