

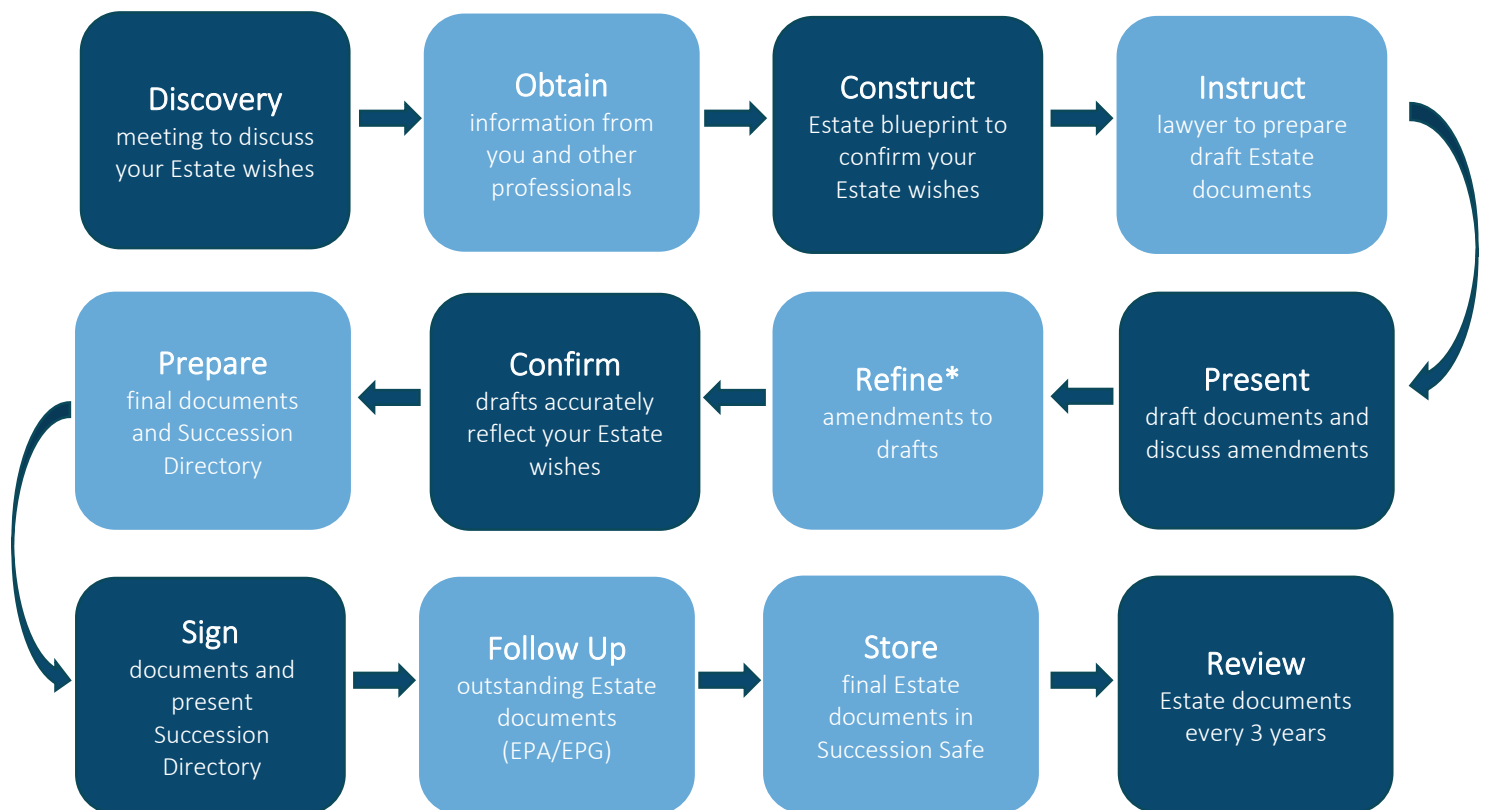


Understanding what is most important to you...

At Succession Matters, our Estate Service is about understanding your Estate wishes and what is most important to you when creating your legacy.

We work collaboratively with other professionals to develop a plan that accurately reflects your Estate Vision.

Our Estate Process



*We will continue to liaise with you and the lawyer until your Estate documents accurately reflect your Estate vision.

Estate Service – Fees

Our minimum fees to resolve your estate needs, include all meetings with you, other professionals and our administration time. We will provide you with a fixed fee package tailored to your specific estate needs.

Packages	Foundation \$3,850 - \$5,250	Core \$6,050 - \$7,450	Complex (large Estates) \$11,000 +
Wills	✓	✓	✓
Testamentary Trusts	Single	Multiple	Multiple
Power of Attorney and Guardianship	✓	✓	✓
Advanced Health Directives	x	✓	✓
Letter of wishes (DIY template)	✓	✓	x
Letter of wishes (prepared by Succession Matters)	x	x	✓
Beneficiary nominations (up to 2 super funds)	✓	✓	✓
Succession Directory	✓	✓	✓
Succession Safe (lifetime storage)	✓	✓	✓
Number of entities (i.e. trust, self-managed super)	Up to 2	Up to 4	Unlimited
3 Yearly Estate Review	✓	✓	✓

• All fees are inclusive of GST

• We allow three months to complete your Estate plan

Single Service Options

- Succession Safe (lifetime storage) \$330
- Succession Directory \$440
- EPA Lodgement Service \$165 + Landgate Fees