

Things to consider (couple)

Information Guide

There are many things to consider when planning your estate. Before you proceed with having any estate planning documents produced, you and your loved ones should carefully consider the following questions (where applicable):

1. Who should be the executor of our wills? (*our standard approach is for each of you to be appointed as the other's executor*)
2. Who should be appointed to make financial, personal and medical decisions on our behalf if either of us loses the capacity to make these decisions ourselves? (*our standard approach is for each of you to be appointed to act on the other's behalf*)
3. If our first named executors or attorneys are not able to act, who would we appoint?
4. Other than our immediate family, are there any other individuals or entities we would like to leave part of our estate to?
5. In the unfortunate circumstances that we and our immediate family die together, who should our estate pass to? (*our standard clause is for the estate to be divided 50% to each set of parents equally or, if both parents of either spouse are no longer alive, then 'their' 50% is divided among that spouse's siblings equally*)
6. If we both die together, who would look after our children? (*i.e. who should be the guardian of your children*)
7. Are there any specific wishes we would like noted?

**Information Source – eLawyer*

NOTE: This information guide covers legal issues in a general way. It is not designed to express opinions on specific cases. It is intended for information purposes only and should not be regarded as legal advice. Further advice should be sought regarding your specific situation before taking any action.