

How to kick start your client's Estate Plan

STEP 1 – DETERMINE WHETHER YOUR CLIENT'S AFFAIRS ARE COMPLEX OR SIMPLE

You can do this by simply answering the following 8 questions:

Question	Response	
	Yes	No
1. Does your client have a blended family?	<input type="checkbox"/>	<input type="checkbox"/>
2. Does your client have children or other beneficiaries under the age of 18 years?	<input type="checkbox"/>	<input type="checkbox"/>
3. Does your client or do any of their beneficiaries have special needs or do they have personal risk such as:	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> • possible relationship break down • financial difficulties • alcohol or gambling addictions • disability • bankruptcy • do they operate their own business 		
4. Does your client or the entities they control have a net worth of \$5 million or more?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does your client have a Self Managed Superannuation Fund?	<input type="checkbox"/>	<input type="checkbox"/>
6. Is your client concerned that their Estate will be challenged?	<input type="checkbox"/>	<input type="checkbox"/>
7. Does your client have companies, trusts or are they involved in a partnership?	<input type="checkbox"/>	<input type="checkbox"/>
8. Is your client self-employed?	<input type="checkbox"/>	<input type="checkbox"/>

STEP 2 – TAKE ACTION

If your client answers '**Yes**' to any of these questions then their affairs are Complex.

Action – you should contact Redchip to discuss the next steps.

If your client answers '**No**' to all of these questions then their affairs are Simple.

Action – your client can choose to:

1. Meet with Redchip to discuss their Estate Planning requirements; or
2. Complete and return to us the Will Making Checklist.