



Estate First Lawyers

PLAN | PROTECT | SECURE

YOUR ESTATE PLANNING

Our Passion. Our Focus.



Estate Planning

We offer a full range of Estate Planning services including advice and drafting of everything you need to have a comprehensive

Estate Plan:

- Wills from simple to complex
- Testamentary Trusts in Wills
- Protective Trusts and Special Disability Trusts
- Inheritance Agreements
- Blended family solutions
- Advising on the risk of estate claims and crafting appropriate strategies
- Tax effective strategies
- Estate planning for superannuation
- Reviewing family trusts to pass control on death
- Documents for incapacity (such as Enduring Powers of Attorney, Health Directives, etc.)



Estate First Lawyers is the only law firm in Australia that practices exclusively in estate planning and administration. This focus gives us competitive expertise and efficiency in our service to you.

Estate Administration

We understand that when a loved one dies, it is a very difficult time. We can help with:

- Grants of Probate
- Organising collection of assets
- Transfer of property, shares, bank accounts and other assets
- Paying bills
- Tax advice to provide the most effective outcomes
- Advice to executors to ensure legal compliance
- Advice regarding an estate claim
- Distribution of the Estate

“I have an up-to-date Will – isn’t that enough?”

No. And here’s why...

A Will does not cover all of your assets

A Will *only* covers assets you hold in your individual name, or property held as tenants in common. It does not automatically control your superannuation, life insurance, joint assets or assets in trusts.

An Estate First estate plan is a comprehensive set of documents governing your entire inheritance plan. It covers all of your wealth, based on a foundation of the right advice and strategy.

A standard Will does not provide you with tax opportunities

An estate plan provides you with an overall tax strategy, a Will does not.

There are so many tax opportunities to take up and so many tax pitfalls to avoid! The benefits of getting the right tax advice in your inheritance planning are significant.

A Will alone does not protect your loved one’s inheritance

We all want to ensure our assets go to the loved ones we specify, in the right amounts. But inheritances are being regularly eroded by estate claims or beneficiaries going through marital breakdown, bankruptcy etc.

It has been estimated that only 30% of your wealth will be received by your second level beneficiaries (for example, your grandchildren).

Estate First have a range of strategies, (including testamentary trusts in Wills) to significantly reduce this risk.

A Will does not help you on incapacity

As your Will does not activate until death, other documents are necessary to protect your wishes in the event of incapacity.

This is why you need an Estate plan



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We made our appointment with Estate First Lawyers and began a journey of learning. Right from the start, our lawyer was friendly, confident, and most professional, putting us at ease and really personalising what she was explaining to our own situation.

We realised very quickly that we had only a little understanding of what happens when a Will is activated and how our Wills were not adequate. Everything was prepared in a timely fashion and explained again to us before we signed.

Now that the process is complete, we feel relieved and comfortable about our circumstances. I can strongly recommend Estate First Lawyers.

John & Margaret, G

4 EASY STEPS

1

Make an Appointment

By calling us on
1300 132 567 or
emailing us at
info@estatefirst.com.au

2

Meet with your Lawyer

We will listen, answer your questions, craft your estate plan and provide you with a fixed fee quote.

We'll keep you posted

You will receive draft documents to review. You can discuss your plan with us at any time.

3

Final document meeting

We'll go through all final documents together to ensure the plan is exactly what you want.

4

The Estate First Difference

We work exclusively in the area of estate law.

Our team of dedicated lawyers is one of the largest in Australia.

With our depth of knowledge and years of experience, we have developed the efficient delivery of comprehensive estate planning within a competitively priced, fixed fee service.

Your original estate planning documents can be stored with us at no cost to you.

Special Fixed Fee First Consultation Rate



Are you a first-time client to Estate First?

We are happy to offer you a special discount for your first consultation of \$295+GST (up to 1.5hrs).

During your consultation (which can be done face to face or virtually), you will receive valuable, tailored advice from an experienced estate planning lawyer and a written fixed fee quote. If you stay longer than 1.5 hours, you will only be charged our hourly rate from that point. There is no obligation to proceed with our services, however 94% of clients proceed with their Estate Plan. **If you do proceed, we will deduct the \$295+GST off the price of any Will that you go ahead with.**

We provide our estate planning service Australia wide.

**To make an appointment to meet with a solicitor, call Estate First
on 1300 132 567 or email us at info@estatefirst.com.au**





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or email us at

info@estatefirst.com.au

We provide an Australia wide estate planning service virtually or the choice of virtual or face to face at our offices:

Head Office

Level 10, Toowong Tower,
9 Sherwood Road,
Toowong QLD 4066
(above Toowong Village
Shopping Centre)

QLD Regional Visits

Gold Coast
Sunshine Coast
Toowoomba
Rockhampton
Townsville & Cairns

Brisbane CBD Office

Level 20, HSBC Building
300 Queen Street,
Brisbane QLD 4000

Sydney CBD Office

Level 26
44 Market Street
Sydney NSW 2000

Melbourne CBD Office

Level 40
140 William Street
Melbourne VIC 3000

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Website: www.estatefirst.com.au

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Individual liability limited by a scheme approved under professional standards legislation

This information provided in this brochure is general in nature and should not be acted upon without first obtaining legal advice on your particular situation.