

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



ESTATE FIRST LAWYERS

Providing Estate Planning Services Australia Wide

Offices

Head Office: Level 10, Toowong Tower, 9 Sherwood Road, Toowong QLD 4066

Brisbane CBD: Level 18, 324 Queen Street (*cnr of Queen and Creek Streets*)

Sydney CBD: Level 26, 44 Market Street

Melbourne CBD: Level 40, 140 William Street

Virtual Estate Planning Service

Western Australia, Northern Territory, ACT, South Australia, Tasmania

Queensland Regional Visit Locations

Gold Coast, Sunshine Coast, Toowoomba, Cairns, Townsville and Rockhampton.

Mailing Address:

PO Box 2178, Toowong, QLD, 4066

A Division of Corporate First Pty Ltd ABN 61 613 157 074

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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.



ESTATE FIRST LAWYERS

THE ESTATE PLANNING EXPERTS

Your Estate Planning.

Our Passion. Our Focus.



"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.

For more information, please do not hesitate to get in touch with our specialist team.

Client Testimonials

We can't thank our Lawyer enough for everything they did to set up our Estate Plan. We felt that no question was ever too silly to ask and we left understanding everything from a legal perspective totally. We feel 100% satisfied (and I don't say that very often) with the total service given to us by Estate First Lawyers. We will be recommending Estate First to our friends.

Gerald & Maree O ★★★★★

Estate First made us feel that our affairs were now sorted and we were in good hands well into the future. The fees were competitive with other lawyers but what makes the difference is their superior service and care for their clients. They are professional, knowledgeable and trustworthy. You are made to feel important to them and are placed at ease in all the dealings with them.

Brian & Pam A ★★★★★

Our experience with Estate First Lawyers was first class. From the outset we were made to feel very welcome and all advice given was in a friendly and courteous manner. Our questions were answered with no fuss and email communication was prompt, clear and precise. We would highly recommend these services.

Patrick & Anne S ★★★★★

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.

7200+

Estate Plans Completed

94%

Clients accept the fixed fee quote and proceed

99%

Clients have peace of mind with their Estate Plan

92+

Years of combined legal experience in Estate Law

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

Make An Appointment

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

1.

Meet With Your Lawyer

Whether we meet virtually or face to face, we will listen, answer your questions, craft your estate plan and provide you with a fixed fee quote.

2.

We'll Keep You Updated

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

3.

Final Document Meeting

We will go through all of your final documents together to ensure the plan is exactly what you want.

4.