

Your Client's Estate Planning

Our Passion.
Our Focus.

One of Australia's
leading estate
planning law firms.

ESTATEFIRST.COM.AU



**ESTATE
FIRST
LAWYERS**

THE ESTATE
PLANNING
EXPERTS





As a professional advisor you want to ensure that your client receives the same expert advice that you have given them.

At Estate First Lawyers you can be assured that your client is in the hands of career dedicated estate planning lawyers.

Estate Planning Services.

We offer a full range of Estate Planning services including advice and drafting of everything your client needs 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.)

Our Easy Process and Fixed Fee Pricing

Your client's estate planning is made quick and easy with our unique '4 easy steps' process. Because we focus only on estate work, we provide a professional estate planning service that is efficient and cost effective.



Make An Appointment

📞 1300 132 567
✉️ info@estatefirst.com.au

You are welcome to attend with your client.

7200+

Estate Plans Completed



Client Meets With A Lawyer

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

94%

Clients accept the fixed fee quote and proceed.



We'll Keep You Updated

Your clients will receive draft documents to review. Your client can discuss their plan with us at any time they want.

92+

Years of combined legal experience in Estate Law.



Final Documents Meeting

We will go through all of the final documents with your client to ensure the plan is exactly what they want.

99%

Clients have peace of mind with their Estate Plan

Your client will receive their first consultation with us at the special rate of \$295 + GST (up to 1.5 hours). They will receive valuable, tailored advice. If they proceed with a Will, the \$295 + GST will be deducted from the Will price.





Estate Planning Lawyers, Experts at Securing your Client's Legacy.

We are not an ordinary law firm. Estate First Lawyers was built to service the estate planning needs of clients referred to the firm from financial advisors in both private practice and those working inhouse with super funds, as well as accountants.

What Advisors say about our service.

We value the strong relationships that we build with our referring Advisors and Accountants, ranging from small to large organisations. Your relationship with your client is of paramount importance and so we strive to deliver an exceptional client experience, every time and you'll be included in the process.

What sets us apart.

-  Law firm specialising in estate planning
-  One of the largest estate planning legal teams in Australia
-  Consistently high client satisfaction ratings
-  Timely and efficient, fixed-fee service
-  We work closely and collaboratively with advisors



"I have utilised the services of Estate First Lawyers for my clients for many years. I find Ann and her team not only technically brilliant, but they are also great people to deal with. I have no hesitation in recommending their services in order to establish the right personalised estate plan."

Peter B

Senior Private Wealth Manager



"I have certainly had my eyes opened regarding some of the estate planning done by other firms I came away [from those experiences] more thankful than ever for all that Estate First has done for us and our clients."

Nerissa R

Accountant & Partner



"When it comes to Estate Planning there is only one place we refer our clients and that is Estate First Lawyers. They are a team of knowledgeable, caring and friendly specialists. We hear nothing but compliments about their service and they have my full confidence. Thank you for taking care of our clients!"

Neil S

Financial Advisor & Partner

We're here to support you.

ADVISOR TOOLS & FACT SHEETS

Includes extensive Estate Planning Fact Sheets, Health Checks, Booklets, Videos and other useful materials.

TRAINING & PRESENTATIONS

Education opportunities for you and your clients, including webinars.

GET STARTED TODAY

1300 132 567

COMPLIANCE SUPPORT

We can assist with this important issue.

Built on Trust

ACCREDITATIONS



MEMBERSHIPS



To find out more, refer a client or to discuss a client issue, get in touch.

Whatever your query, we would love to have an obligation free chat with you.

OFFICES

HEAD OFFICE
Level 10, Toowong Tower
9 Sherwood Road
Toowong QLD 4066

MAILING ADDRESS
PO Box 2178
Toowong, QLD, 4066

BRISBANE CBD
Level 20, HSBC Building,
300 Queen Street

SYDNEY CBD
Level 26
44 Market Street

MELBOURNE CBD
Level 40
140 William Street

GET IN TOUCH

📞 1300 132 567
✉️ info@estatefirst.com.au

Virtual Estate Planning Service

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

Queensland Regional Visit Locations

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



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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.

