



ESTATE PLANNING

ESTATE PLANNING: YOUR ESTATE PLANNING CHECKLIST

- o Has it been more than five years since you last reviewed your Will?
- o Have you had children or grandchildren since you last reviewed your Will?
- o Have you married, remarried, entered into a relationship or divorced since you last reviewed your Will?
- o Do any of the beneficiaries in your Will have special needs?
- o Do you have any beneficiaries in your Will that you no longer wish to provide for or who have passed away?
- o Do any of your beneficiaries live overseas?
- o Is the Executor named in your Will still appropriate?
- o Are you concerned about how your Trustee Will invest or protect funds held by your Estate?
- o Do you have items mentioned in your Will which you no longer own?
- o Have you nominated guardians for any minor children?
- o Have you given instructions in relation to your funeral?
- o Do you wish to provide an education fund for your children or grandchildren?
- o Do you wish to make a gift to any charitable organisation?

Estate planning is more than just your Will. If you ticked any of the above boxes, we recommend you consider your Estate planning needs. If you would like to speak to one of our Estate planning specialists, please email us at contact@fiduciaryservicesltd.com

If you need further clarifications on this, please reach out to us
contact@fiduciaryservicesltd.com

