

Don't risk missing
Your Ultimate Deadline®



Protect your family's future and your
Assets with a tax effective
Will and estate plan.

Every day you care for yourself and your family. Let Your Ultimate Deadline help you keep caring beyond your lifetime. You need to maximise the tax benefits and minimise the risks for your family. We know a "kit will" or a "simple will" without testamentary trusts is just not enough.

Act before Your Ultimate Deadline® has passed

To complete this task for an affordable fixed fee contact Sydney Estate Planning Lawyers on 02 8915 4900 or email mail@sydneybl.com.au

The fixed price solution for Your Ultimate Deadline®

Why does Sydney Estate Planning Lawyers offer a fixed price estate planning service?

Sydney Estate Planning Lawyers' fixed price estate planning service has been developed because of:

- our concern about the cost of estate planning; and
- the difficulty in getting people to deal with this important need.

So we made the process:

- more affordable by packaging the estate planning process to enable people to engage in it in their own time; and
- created a system that demonstrates that dying without a well drafted will and an appropriate estate plan is a lost opportunity for beneficiaries of a gift on death to save tax on the income from the investment of their gift and protect assets against the 7 risks of passing wealth on death.

How does the fixed price estate planning service work?

Sydney Estate Planning Lawyers innovative packaging of its estate planning services:

- does not involve repeated discussion time with or advice to the will maker;
- is a process that involves the will maker reading and completing our screening tool to see if they fit the profile set out in it;
- does not require a lengthy Q&A and there is no requirement to send us supporting documents like trust deeds.

The profile in the screening tool is the estate planning outcome that about 90% of Sydney Estate Planning Lawyers' clients choose to use. If the will maker fits the profile, all the will maker needs to do in reading it and sending it to us is give us some personal details and answer no more than 9 questions as set out in the screening tool. We then send the draft documents for review and signing. **It is that simple.**

How can Sydney Estate Planning Lawyers' provide this service at such a reasonable price?

We are able to offer our low fixed price because:

- of the way in which we process the work and the conditions and assumptions that apply;
- completing our screening tool avoids the need for the normal time consuming face to face meetings that take place as part of the estate planning process;
- from client to client, estate planning involves many recurring issues with the same solutions and many people's circumstances are not unique.

Our wills do what "kit wills" and "simple wills" don't do - **SAVE TAX AND HELP PROTECT ASSETS FROM THE 7 RISKS OF PASSING WEALTH ON DEATH.**

What is the cost of Sydney Estate Planning Lawyers' fixed price estate planning service?

The end product of Sydney Estate Planning Lawyers' innovative way of providing fixed price estate planning services is a fixed price of \$5,500 GST inclusive for testamentary trust wills, powers of attorney, guardianship appointments and an executive summary (which applies to a husband and wife / de facto or same sex couple or a single person and is not a cost per head). This can be done without compromising our service or the end product that we deliver. Clients still end up with first class documents that are suitable to their needs and give a reasonably long term outcome.

There will be will makers who either request or whose circumstances require a full face to face advice and implementation service. We normally charge \$11,000 GST inclusive for that unless there are more complex or simple requirements. No one is charged more than \$5,500 GST inclusive without their prior agreement.

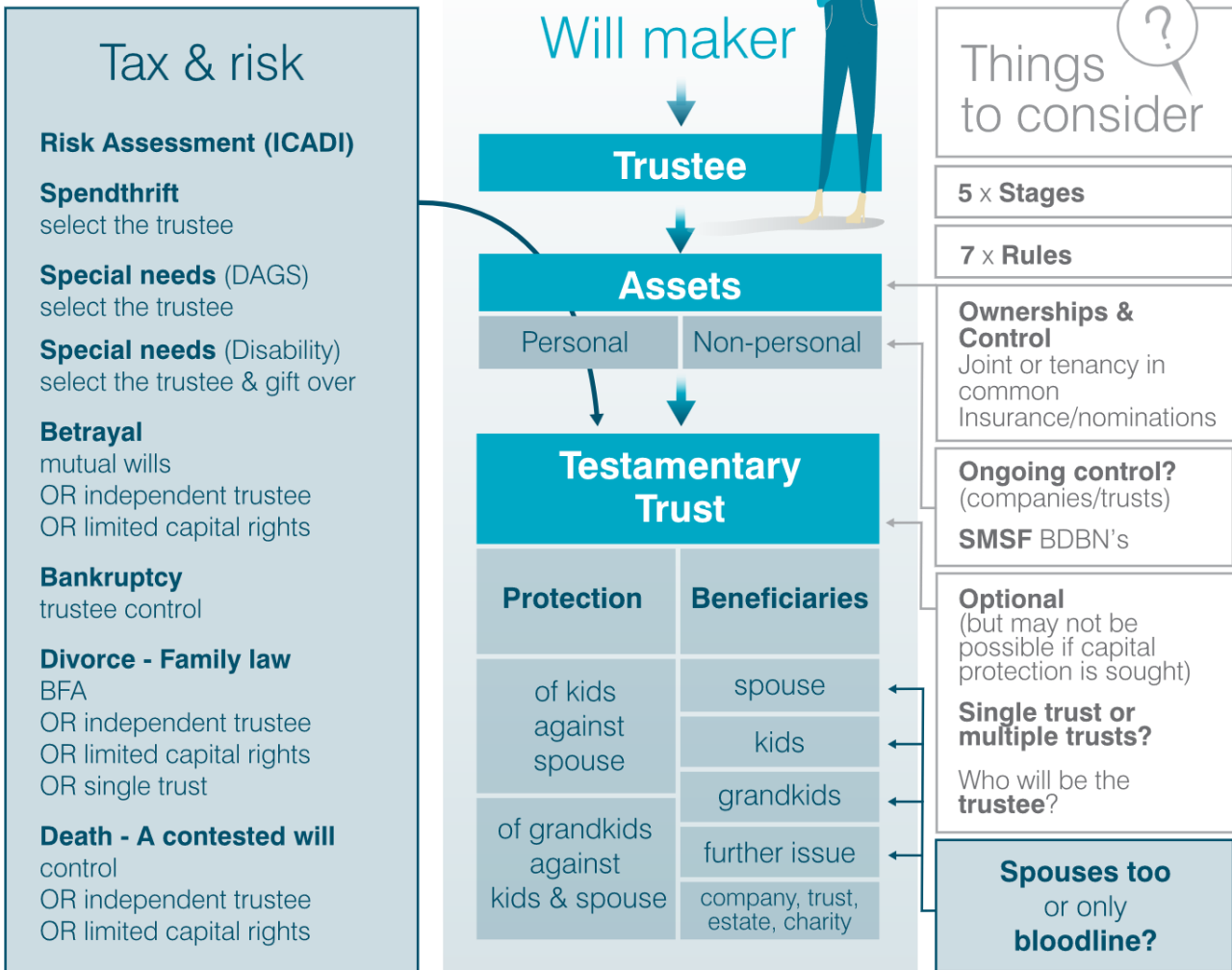
This fixed price allows for only 1 hour of advice, email questions, telephone discussion and face to face time other than for signing of the documents and does not include personalised letters of advice, required changes to any business structures or any housekeeping.

Sydney Estate Planning Lawyers provides estate planning services.

The below flow chart sets out all of the required information to have an estate planning discussion.

So don't risk missing ...

Your Ultimate Deadline[®]



Disclaimer: The information in this document is general in nature and is not intended as legal advice. You should not do or fail to do anything in reliance on information in it. We do not accept any responsibility for any loss that you suffer if you do. You should seek professional advice before you do anything about the issues set out in this document.

If you would like to receive electronic newsletters, please forward your email address to the address below:



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