

Your Estate Plan

Follow these simple steps to get your will
and enduring power of attorney sorted

FIND THE RIGHT PACKAGE FOR YOU

Browse our Peace of Mind packages
on the next page and find the
package that meets your needs.

REVIEW YOUR DOCUMENTS

We will draft your estate planning
documents and send them to you
for your review.

REST EASY

Rest easy knowing your affairs
are now in order!

DISCUSS YOUR SITUATION AND WISHES

Book an initial consultation with
one of our estate planning lawyers
in-person or via video conference.

SIGN YOUR DOCUMENTS

Book a final appointment to sign
your estate planning documents
in-person within four weeks of
receiving the drafts.

Peace of Mind

PACKAGES

Basic

from \$350

- Standard will \$440
- Enduring power of attorney \$350
- Medical treatment decision maker appointment \$350

Essential

\$990 individual / \$1950 couple

- Standard will
- Enduring power of attorney
- Medical treatment decision maker appointment
- Pro forma letter of wishes

Premium

\$1790 individual / \$3250 couple

- Testamentary trust will + explanatory document
- Enduring power of attorney
- Medical treatment decision maker appointment
- Pro forma letter of wishes

Peace of Mind

ADD-ONS (PER PACKAGE)

Blended family

I or my partner have children to a previous relationship. **\$350**

Leaving someone out

I want to leave someone out of my will (spouse, children, step-children, someone that lives or lived with me) **\$350**

Life tenancy/right to reside

I want to allow someone to live in my property for life or a defined period but want the property to pass to someone else thereafter. **\$350**

International Will

I have assets in another country and want my will to be easily administered there **\$300**
*only available in participating jurisdictions

Special Disability Trust or Protective Trust

I have a beneficiary who suffers from a disability/vulnerability and want their share to be able to go to a special disability trust/protected trust.

Standard Will — special disability trust only **\$150**

Testamentary Trust Will — special disability trust and protected trust **\$350**

Bespoke work

I need a special clause tailored to my specific wishes, eg. guardian payment, trust for pets, frozen embryos, reviewing binding financial agreement **\$350**

Binding Death Benefit Nomination

I want you to complete and witness a binding document nominating a beneficiary to receive my superannuation **\$55**

continued on next page

Peace of Mind

ADD-ONS (PER PACKAGE)

Self Managed Superannuation Fund

I have a controlling interest in a SMSF — you will need to review the deed and provide me with succession advice **\$450**

Company/Trust

I have a controlling interest in one of these assets and will need you to review the seminal documents to provide me with advice (cost per company or trust) **\$220**

Interpreter

I come from a non-English speaking background and will need an interpreter (the appointments will be longer and additional documents will need to be drawn for the interpreter to sign) **\$200**

*does not include interpreter's fees



Get Started

1

Make an appointment with one of our estate planning lawyers [here](#).

2

Make pre payment of the initial consult fee of \$440 (included in our package fees) into our trust account as follows:

McManus & Co Lawyers Law Practice Trust Account
BSB 063 240
Account No. 0000 0011

Please use your surname as your payment reference and email your residential address & confirmation of payment to info@mcmanuslawyers.com.au.

By paying funds into our trust account, you authorise and consent to us using those funds to pay our costs after you receive our tax invoice by email for the work completed.

Our First Meeting

What we'll do

Our first meeting is where together, we work out the structure of your estate plan.

In this meeting, we'll talk through your past and present situation, and discuss your wishes, hopes and concerns. To provide you with tailored strategic advice, we'll need accurate information about both your financial and personal circumstances.

For these reasons, we ask that you consider the below information and come prepared to make the best of our time together.

How to prepare

You can prepare by considering the following questions:

- Who you wish to give your estate to;
- Who you trust to take financial control of your affairs (during your life and after your death);
- Who you trust to make medical treatment decisions for you if you cannot;
- Who you trust to look after your children (if you have children under 18 years).

We will also need to know about your assets and liabilities, including any assets held jointly, any controlling interests in family trusts or companies, your superannuation and any life insurance. Please see the next page for information you will need to provide before or at our first meeting.

Please note, the scope of our retainer specifically excludes the provision of taxation or financial advice.

Your Checklist

To make the most of our first meeting, please bring the following information along (or email details to admin@mcmaluslawyers.com.au beforehand)

- Full names, dates of birth and addresses of people you wish to include
- Approximate values of your assets
- Ownership structure of your assets (eg jointly, separately, by a company)

WHERE RELEVANT TO YOU:

- Most recent superannuation statement
- Most recent life insurance statement
- Company extract + constitution (where company director/secretary)
- Trust deed (for trusts you have a controlling interest in)
- Most recent financial statement for any company/trust
- Self managed super fund trust deed
- Loan agreements (for related party loans)
- Binding financial agreement in force



Gabrielle McManus
Principal Lawyer



Laura Di Dio
Lawyer

Meet Your Wills & Estates Team



Taylah Hollands
Lawyer



Amy McClelland
Lawyer

Meet Your Support Team



Susanne White
Office Manager



Carmel Gara
Law Graduate
Wills Clerk

Need anything? We're only a phone
call away.

What's in the fine print?

This cost disclosure is valid for 60 days from the day it is provided to you.

THE FIXED FEE WORK

Our fees as set out on this cost disclosure include the following work:

1. Meeting with you to take instructions and provide advice (45 minutes per person);
2. A follow up email to request any missing instructions or documents;
3. Review of your email in response and any attachments;
4. Drafting the documents and emailing them to you;
5. For Premium Packages - additional conference to explain the testamentary trust wills and answer your queries (30 minutes per person)
6. Meeting with you in person within four weeks of sending you the drafts to explain the final documents (and attending to witness your signature if you wish) (estimated 30 minutes per person);
7. Storing your original will in our deeds safe.

We will prepare the documents for signature based on the instructions you have provided to us. We ask that you carefully review the draft documents prior to the appointment to sign the documents. In particular we request that you notify us of any amendments at least 24 hours prior to this appointment.

ADDITIONAL HELP

We appreciate that your situation may be a little more complex and you may require additional help outside the scope of our fixed fee package to get to the finish line. If you need such additional help, in addition to our fixed fees, you'll be charged for the additional work on the file, charged according to time at our hourly rate of \$396 (for a solicitor) or \$140 (for a paralegal) billed in six minute intervals.

Additional help may include:

1. Extra consults to provide additional advice and obtain your instructions;
2. Following you up for any outstanding instructions or documents not provided within 2 weeks of our request;
3. Any time spent following you up in the event the documents are not signed within four weeks of the drafts being prepared and sent to you;
4. Any time to complete a round of changes after drafting your documents;
5. Amending the documents after signing for resigning.

What's in the fine print? cont

FINANCIAL ADVICE

We reiterate that our retainer does not extend to providing you with financial or taxation advice regarding your estate plans. Should you require such advice, please speak with your accountant or seek the advice of a financial adviser. If you would like a recommendation, please do not hesitate to ask.

INVOICES

We will ask you to make prepayment of our costs in two stages into our trust account, firstly before the initial consult, and secondly before drafting your documents. The fee for the first consult is \$440. The \$440 is included in the cost of the documents if you proceed following the consult, however if you do not, it is a non refundable fee for the first consult. You hereby authorise us to use funds placed into our trust account to pay our costs after you receive our tax invoice for the work completed. You consent to receiving our invoices by email.

HOW WE WORK

We use a variety of technology, including third party cloud based platforms, to store documents, communicate with clients and government departments, complete electronic settlements and undertake other activities.

We exercise due care and diligence in our use of such third party platforms and technology services to ensure that their security and management standards meet or exceed applicable security standards. Unfortunately, however, all third party cloud based platforms and technology services are at risk of cyber-crime attacks and cannot be guaranteed as completely secure. You consent to our use of these services to store your files, communicate with you and carry out other necessary tasks relating to your estate planning work.

What's in the fine print? cont

WHAT WE NEED FROM YOU

For us to be able to provide accurate, timely advice & assistance, we need you to give us accurate and prompt instructions to the best of your knowledge. If you are unsure about the ownership of your assets, we will strongly recommend that searches are performed to ascertain same. We can undertake these searches at additional cost. If you do not instruct us to perform searches, we will draw the documents based on your instructions as to ownership.

CAPACITY

In order for your documents to be valid, you will need to have the required legal capacity. We may ask you to obtain a letter from your treating medical practitioner confirming your legal capacity to validly enter into the documents. Please note that we do this in order to uphold the integrity of your documents and to minimise the risk of claims made by third parties in the future that may cost your estate significant legal fees.

CONFLICT SITUATION

If you are a member of a couple and both parties wish to engage us for their estate planning, you are both required to attend the appointments together. We are bound to act in our clients' best interests and to protect their confidentiality. Separate meetings may give rise to a potential or actual conflict of interest which may result in us having to cease acting for both parties.

If you do not attend together, we will only be able to assist with the estate planning of the first person to engage us.

YOUR DOCUMENTS

At the conclusion of your matter, any original documents provided by you or received on your behalf (with the exception of your will or those documents to be lodged in our safe) will be returned to you by ordinary post. Should you wish to collect the originals, please let us know prior to your matter finalising.

What's in the fine print? cont

With the exception of original wills, deeds, leases and agreements (excepted documents), we will retain all documents relating to your matter electronically for no more than seven years. You authorise us to destroy all documents relating to your matter aside from excepted documents prior to the seven year period expiring, provided that we retain an electronic copy of same for the seven year period. Aside from excepted documents, you authorise us to destroy any and all documents relating to your matter seven years after the date of our final account.

If you request a copy of your documents within the seven year period, they will be provided to you in electronic, not hard copy form.

YOUR RIGHTS

You have the right to:

- Ask for an explanation of our fees
- Negotiate a costs agreement
- Negotiate the billing method (e.g. timing or task)
- Request a written progress report of costs incurred
- Receive a written bill for work done
- Request an itemised bill
- Contact your local regulatory authority

JURISDICTION

The Uniform Law as applied in Victoria is applicable to legal costs in this matter.

ACCEPTANCE OF OUR COSTS AND OUR TERMS AND CONDITIONS

These are our costs and the terms and conditions on which McManus & Co Pty Ltd will provide you with estate planning assistance.

You will be taken as to accepting our costs and terms and conditions by continuing to instruct us in this matter.