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WILLS & ESTATES AUSTRALIA PTY LTD

TIMELINE

ESTATE PLANNING PROCESS

1. INITIAL CONTACT

Verification of your requirements, time frames and ascertaining whether we can meet your needs.
Appointment booked and checklist of information required provided to you.

2. INITIAL MEETING

Detailed discussion of your needs, family and asset situation.
Verification of identity.
Preliminary review of documents.

3. RECOMMENDATIONS

We will review and verify the information you have provided to ensure the accuracy of documents prepared.
We may request additional information to ensure that we fully understand your needs.

4. QUOTATION

After we identify your needs and we agree on the scope of work, we will provide a written fee agreement.

5. DRAFTING

We create draft documents for your review and approval.
If fees for the matter exceed $1500, an interim bill will be generated.

6. REVISION

Amendments and changes to your documents may be made during this stage.
A telephone or video consultation may be required to clarify advice or instructions.

7. SIGNING APPOINTMENT

Your documents are validly signed and witnessed.
A final bill will be provided.

8. DELIVERY

You will receive your completed and signed documents.
We will provide instructions on how to properly store your documents.