



NSW Trustee
& Guardian

Have you planned ahead?

- ☒ Make a Will
- ☒ Make a Power of Attorney
- ☒ Appoint an Enduring Guardian

With more
than 100 years
of experience,
we can help.



tag.nsw.gov.au





Prepare a Will

A Will helps to ensure your assets will be distributed according to your wishes when you die. Even if you think you don't have much, it is still important to make a Will.

Dying without a Will

If you don't have a valid Will, the law sets out which of your family members are entitled to your assets when you die. This may not be what you want to happen.

For example, the law does not include gifts to friends or charities and there is no provision made for pets.

Don't do-it-yourself

Do-it-yourself Will kits are not a good idea because anyone who is not legally qualified risks making a mistake or creating uncertainty with unclear wording. Questions about whether a Will is valid have to be decided by the Supreme Court and can result in large costs and delays.

Choosing an executor

An executor administers your estate and carries out your wishes after you die. You may see it as a compliment to appoint a family member or friend as your executor, but the role can be demanding. An executor needs an understanding of the law, tax rules and they may need to resolve conflict between beneficiaries. They can also be held personally liable for any mistakes that are made in the administration of the estate.

Keep your Will up-to-date

If you already have a Will, think about whether it is time to update it so it reflects your current circumstances. Situations where you may want to update your Will include:

- buying a house
- marriage
- separation or divorce
- big travel plans
- welcoming a child
- retirement
- health concerns
- change of beneficiary/executor
- death of a loved one/coming into inheritance.

Planning ahead checklist

This checklist will help you think about what to consider before drafting your planning ahead documents.

Will

- ☐ Instructions for funeral arrangements.
- ☐ Details of your beneficiaries.
- ☐ Decide who to appoint as your executor(s).
- ☐ Guardians for your children.
- ☐ Arrangements for pets.
- ☐ A summary of your assets, including real estate, bank accounts, superannuation and investments.
- ☐ Gifts to organisations or charities.

Power of Attorney

- ☐ The person, people or organisation you want to appoint as your attorney(s) to make financial and legal decisions for you.

Enduring Guardianship

- ☐ The person or people you want to appoint as your enduring guardian(s) to make health and lifestyle decisions for you.
- ☐ Decision-making areas your guardian(s) will have authority over, and any specific directions.

Document storage

- ☐ Decide where to safely store all of your planning ahead documents so they can be easily retrieved when needed.

Make a Power of Attorney and Enduring Guardianship

If something happens to you while you are alive and you no longer have the ability to make decisions for yourself, Power of Attorney and Enduring Guardianship documents can be used to provide for your financial and lifestyle decisions.

Your attorney, appointed under a Power of Attorney, can manage your assets and make decisions about your finances like paying bills and managing investments. An attorney can also sign legal documents for you.

Your enduring guardian, appointed under an Enduring Guardianship, can make health and lifestyle decisions for you. For example, your enduring guardian can make choices about where you live and the services you receive such as healthcare.

It is important to choose an attorney and enduring guardian carefully as they are in a position of trust and have a responsibility to act in your best interests.



Will Safe storage

Many people store their Will at home where it can be stolen, lost or damaged. If a Will cannot be located when required, it could cost the estate thousands of dollars. There is also a serious risk your assets will not be distributed as you would have intended because the court may decide that you didn't have a Will.

NSW Trustee & Guardian's Will Safe is a secure place to store your Will, Power of Attorney and Enduring Guardianship documents and they are easy to access when needed.



Why choose us?



Quality

All of our documents are prepared by professional Wills and Estate Planning consultants.



Full service

You have the option of appointing us as your independent executor or attorney.



Safe storage

Store your documents securely in our Will Safe and access it anytime.



Easy access

We take appointments at over 100 locations across NSW.
Video conference appointments also available.



Transparent pricing

Our current fees are always listed on our website: **tag.nsw.gov.au/fees**

Fees are waived for customers who receive a full Centrelink age pension.

Book an appointment today

To book an appointment to make a Will,
Power of Attorney and Enduring Guardianship:



Visit tag.nsw.gov.au



Call 1300 10 20 30



"The team took the time to thoroughly explain important and sensitive processes involved in preparing our Will and other legal documents. Highly recommend this service to ease your mind."

Sarah R, Sydney



"Absolutely wonderful, made me feel at ease. Took time with me and explained everything. I would recommend them."

Judi C, Newcastle



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