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Couples 3-Generation Testamentary Trust Bundle - Checklist

#### Start building your document for free:

1. Select START FOR FREE - the building process is free: <https://legalconsolidated.com.au/couples-tax-effective-estate-planning-bundle/>
2. Answer the questions. Read the hints and watch the training videos. Educate and be empowered.
3. Telephone the law firm for help answering the questions.
4. Select Lock and Build and enter your credit card details.
5. Within seconds, you get our cover letter and the finished document.

|  |  |
| --- | --- |
| **Will maker and Spouse details**  • Your Full Name & Address  • Your Spouses Full Name & Address  • **Full** **Alias Name**: if any assets in another name? |  |
| **Age of Majority**  •After you both die, the age your Beneficiaries get their interest in your Estate? | The default is 18 years of age. Otherwise select another age: |
| **Backup Executors**  • After you are both dead, FULL NAME of your Executors | Normally, all your children or Beneficiaries. (The best Executors are the persons getting your estate.) |
| **Guardians if any your children are currently under 18** | E.g. the 4 grandparents. FULL NAMES & ADDRESSES |
| **Specific Gifts**  • Describe Gift and FULL NAME & ADDRESS of the person | Best to leave this blank. |
| **Residuary Beneficiaries**  • FULL NAME, Address  Age of Majority (if required)  Percentage interest - %  This must equal 100% | E.g. First Middle Surname, 23 Sample Street, Suburb, NSW: 33 13/% |
| **Disaster Clause** have young children? You travel in the same car, and you all die together | E.g. 50% to your side of the family. 50% to spouse’s side of the family. |
| **Full Name of person that may challenge your Will**  **Full Name of person that may challenge your spouse’s Will** | E.g. ex-spouses, children being cut out of the Will |
| **Contemplation of Marriage** | If you and your spouse are in a defacto relationship then put in each other’s FULL NAMES. |
| **Contemplation of Divorce**  Name of person you may divorce. Obviously, this is NOT your current spouse. |  |
| **Back up Attorney in Power of Attorney**  You hold each other’s Power of Attorney. Who carries out that job, when you and your spouse can no longer look after each other? Full Name & Address. |  |

