

If you die without a Will, your assets will be distributed in terms of intestacy rules according to your state, rather than according to your wishes. Don't allow your hard work to go to waste, protect your legacy today.

Our Estate Planning Process

Step 1

Needs Assessment

You will complete your needs assessment questionnaire

Step 2

Confirm Package Required

We'll discuss your needs and agree on the package you require questionnaire

Step 3

Confirm Information

We'll help collate and submit the information required for the solicitor to prepare your documents

Step 4

Online Meeting

Online meeting with the solicitors and our team to confirm your estate planning instructions

Step 5

Sign Documents

Formal documents prepared and sent to Steer Wealth Planning for you to sign.

What you'll receive:

A Legal Will
(With Guardianship where applicable)

Enduring Power of Attorney- Financial

Enduring Power of Attorney- Medical

Memo of Directions

Costs:

Single- \$2,200 inclusive of GST

Couple- \$2,860 inclusive of GST

Optional Extras: Testamentary Trust

Single- \$2,750 inclusive of GST

Couple- \$2,620 inclusive of GST

