

Our services are designed to cover all critical parts of your Estate Planning (EP) to ensure your wishes are upheld, that your family and legacy are protected, and to best avoid nasty surprises (including cost) at the "business end" of death or incapacity.

This involves us developing your "big picture" Estate Plan, which includes:

- considering all relevant information, including what is important to you;
- advising you and ultimately addressing all of the relevant considerations; and
- preparing considered and effective documents for you.

Types of EP Documents:

Wills including the powerful option of using **Testamentary Trusts (TT Wills)**

Advance Care Directives (ACDs) for medical & care decisions in event of incapacity

Enduring Powers of Attorney (EPAs) for legal & financial decisions in event of incapacity (or earlier), and **Revocation(s)** to formally revoke a previous Powers of Attorney

Binding Death Benefit Nominations (BDBNs) for superannuation & life insurance benefit directions

Letter of Wishes for providing more detail about after-death wishes or to record your reasons where appropriate

Other documents to record agreement &/or obligations, or effect succession steps upon death or incapacity, including for existing Trusts, Companies or Self-Managed Superannuation Funds (SMSFs).

Important Considerations for your Estate Planning

(don't worry, we'll help guide you through)

- Who will make decisions for your estate or be guardian(s) for any minor children & under what circumstances (including any back ups & how decisions are made if multiple people);
- Who will receive the benefit of your estate, in what proportions & under what circumstances; whether asset protection, taxation & control benefits of Testamentary Trusts (TTs) would better ensure your intended outcomes & benefit your loved ones (then how they are structured & who makes decisions/controls);
- How assets are held now or in the future & if any changes or other asset protection steps are needed to ensure intended outcomes;
- Where superannuation/life insurance benefits should go & under what circumstances;
- For any interest in (or authority for) a company, partnership, trust or SMSF - what mechanisms are in place (or should be) to ensure they can continue, who benefits & who controls them;
- The potential risks or consequences you may not have considered (e.g. a possible claim or unintended taxation) & what can be done to best avoid or minimise these.

If you are unable to make decisions for yourself:

- Who will make decisions for 1) financial & legal or 2) health/residential matters, under what conditions (including any back ups & how decisions are made if multiple people);
- What is important to you when decisions are being made for you, including your wishes & any binding directions you want to make;
- For any interest in (or authority for) a company, partnership, trust or SMSF - what mechanisms are in place (or should be) to ensure they can continue, who benefits & who controls them.

Step 1 | Initial Enquiry

We provide this initial estate planning information including about our costs, which should answer most of your initial questions and give you an idea of what service options and costs will be applicable to your circumstances.

If you are still unsure or have further questions, you can book in for a free 15-minute phone call with one of our lawyers to further discuss.

[Still unsure? Book an Initial Call here.](#)

Please note that an initial 15-minute call cannot cover answers to numerous or complex questions, or provide you with important advice. This can instead be provided by an Initial Strategy Meeting, where we gather all the necessary information about you and your circumstances and provide you with the advice and further guidance you need.

If you're ready to progress your estate planning, or wish to discuss your circumstances in-depth, then book your Initial Strategy Meeting either in-person at our Glenelg or Gawler offices, or otherwise by telephone or online meeting.

[Ready to get your EP sorted? Book your Initial Strategy Meeting here.](#)

Step 2 | Questionnaire

Complete the Questionnaire we will provide you on booking your Initial Strategy Meeting. Completing this Questionnaire is optional, but it assists us to gather initial information beforehand to make the most of our Meeting time together (and save you having to confirm "How do you spell that?" repeatedly!).

Step 3 | Initial Strategy Meeting

We will gather information about you and your circumstances including your wishes and what is important to you, advise you about the documents you need and discuss the strategies and recommended options for you. We will take and confirm your instructions relative to this advice to finalise your big picture "Estate Plan", which is more than just document preparation, but rather is a total consideration of all relevant matters for the protection of your interests and your family, and to provide you with understanding and security.

This Initial Strategy Meeting is included in your total costs if we proceed to preparing documentation on your behalf, or otherwise if you do not proceed further or do not finalise your instructions with us within two weeks of your Meeting, then you will be invoiced a reduced fixed fee of \$385.00 inclusive of GST for this meeting.

Step 4 | Cost Agreement

Following your Initial Strategy Meeting, we will provide you with your Cost Agreement to confirm your legal costs for you to sign to accept. We will have already discussed this with you in your Initial Strategy Meeting, but we want to ensure you have time to consider and review in writing afterwards). Once you have signed to accept your Cost Agreement, we can proceed to preparing your documents.

Step 5 | Document Drafting

We will prepare your estate planning documents and email them to you with detailed advice about the draft documents including how they work and the next steps required. We will highlight any additional information required to finalise the documents and otherwise ask you to review the documents generally to check that the information included is correct (noting we will of course go through the documents with you in detail at the next stages).

Step 6 | Review Your Draft Documents

We ask that you first email us to advise of any errors or changes sought, provide any requested further information, and to ask any questions you have about the drafts.

Your lawyer will respond by email (including providing any updated drafts) where those outstanding matters are relatively simple, or may instead offer times either in-person or by phone for a review meeting, during which the documents can be reviewed together and any changes finalised and confirmed together.

Any updated drafts will be emailed to you and request your approval by return email.

Where you are having an Advance Care Directive (ACD) prepared, where possible and unless it would lead to an unnecessary delay to the scheduling of your Signing Meeting with us, we ask that you print your ACD(s) and arrange for your nominated Substitute Decision-Makers to sign the document where marked, and bring the signed ACD(s) to your Signing Meeting so that the document can be signed off with your other documents in this Meeting. This will avoid the need for you to attend in-person again with us (or with a JP) to have the ACD signed at a later date.

In some cases where your instructions change from those initially provided, or if you are uncertain about your instructions, or where there remains outstanding information to finalise, or if your circumstances are more complex, additional review steps may be required (the costs for which would usually fall outside of any fixed fee package).

Step 7 | Signing Meeting

We will run through your documents again to ensure we are satisfied of your full understanding, your capacity to sign, and the accuracy of the prepared documents including that they reflect your wishes. Minor changes can still be made. You will then sign your documents, and the documents will be finalised (except for any further signing appointment needed for any Advanced Care Directive document).

In some circumstances where you are unable or would prefer not to attend in person for signing, we will send final documents to you with detailed instructions for signing, which you can send securely back to us for safe storage, or otherwise confirm that you wish to retain your originals securely yourself (but we would ask if you could provide us with copies of your signed documents for our records).

You will be invoiced in accordance with your Cost Agreement at the Signing stage (unless otherwise invoiced prior in accordance with your Cost Agreement), with payment terms being 14 days.

Step 8 | Post-Signing

You will return any further documents to us after your signing meeting (e.g. Enduring Power of Attorney and/or Advance Care Directive), and attend with us again if required to sign your Advance Care Directive.

We will retain your original documents in safe storage (unless you have an alternative secure location to store them), and will email you copies of your signed documents with further finalisation information.

Our packages include a future Review Meeting for you to consult with us to consider any change in your circumstances and any updates that may be required.

Our Estate Planning Costs

As at 1 July 2025

We provide fixed fee services in most instances. We will confirm your costs in our Initial Meeting once we know more about your needs & circumstances, but outline a general summary of our costs below (all listed costs are inclusive of GST).

For an Individual:

- **\$1,485** for a Standard EP Package including Simple Will, Standard EPA & Standard ACD.

Additional surcharges apply for a "More than Simple" Will (\$450), a "Complex" Will (from \$680), or a Non-Standard EPA &/or ACD (\$55 each/\$110 for both).

- **\$2,475** for a Standard EP Package including Standard TT Will, Standard Letter of Wishes, Standard EPA & Standard ACD.

Additional surcharges apply for a "More than Standard" TT Will (\$495), a "Complex" TT Will (from \$770), a Non-Standard EPA &/or ACD (\$55 each/\$110 for both), or a Non-Standard Letter of Wishes (from \$275).

- **\$750** for a Standard EPA only

Additional surcharge applies for a Non-Standard EPA (\$55).

- **\$825** for a Standard ACD only

Additional surcharge applies for Non-Standard ACD (\$55).

- **\$1,100** for a Standard EPA and ACD only

Additional surcharges apply for Non-Standard EPA &/or ACD (\$55 each/\$110 for both).

- From **\$275** for a Standard Letter of Wishes

Unless included in TT Wills package; additional surcharge applies for Non-Standard Letter of Wishes (from \$275).

- **\$175** for a Revocation of an Existing EPA

Additional surcharges apply for service of Revocation on previous Attorneys (from \$125 per Attorney served).

- **\$165** for each Standard Super BDBN

Additional surcharges apply for service of BDBN on the Fund (from \$125 per Fund).

- From **\$825** for Services Relating to a Self-Managed Superannuation Fund (SMSF)

Includes reviewing Fund Deed, preparing SMSF BDBN & required consents/declarations, detailed advice to you/your financial advisor & service of signed BDBN.

Other Services:

From **\$550** for Family Trust Deed review & advice.

From **\$660** for an Entity Power of Attorney.

From **\$880** for a Contract for Mutual Wills.

For a Couple:

- **\$2,475** for a Standard EP Package including Simple Wills, Standard EPAs & Standard ACD .

Additional surcharges apply for a "More than Simple" Will (\$495), a "Complex" Will (from \$770), or a Non-Standard EPA &/or ACD (\$55 each/\$110 per two documents).

- **\$3,465** for a Standard EP Package including Standard TT Wills, Standard Letter of Wishes, Standard EPAs & Standard ACDs.

Additional surcharges apply for a "More than Standard" TT Will (\$595), a "Complex" TT Will (from \$825), a Non-Standard EPA &/or ACD (\$55 each/\$110 per two documents), or a Non-Standard Letter of Wishes (from \$275).

- **\$950** for Standard EPAs only

Additional surcharges apply for Non-Standard EPAs (\$55 each/ \$110 both).

- **\$1,100** for Standard ACDs only

Additional surcharges apply for Non-Standard ACDs (\$55 each/ \$110 both).

- **\$1,450** for Standard EPAs and ACDs only

Additional surcharges apply for Non-Standard EPAs &/or ACDs (\$55 each/\$110 per two documents).

- From **\$275** for one shared or **\$495** for two separate Standard Letter of Wishes

Unless included in TT Wills package; additional surcharges apply for Non-Standard Letter of Wishes (from \$275).

- **\$175** for one or **\$300** for two Revocation(s) of Existing EPA(s)

Additional surcharges apply for service of Revocation on previous Attorneys (from \$125 per Attorney served).

- **\$165** each Standard Super BDBN (or **\$300** for Standard BDBN for each person per couple).

Additional surcharges apply for service of BDBN on the Fund (from \$125 per Fund).

- From **\$825** (for 1 member interest) or from **\$950** (for 2 member interests in 1 Fund) for Services Relating to a Self-Managed Superannuation Fund (SMSF)

Includes reviewing Fund Deed, preparing SMSF BDBN(s) & required consents/declarations, detailed advice to you/your financial advisor & service of signed BDBN(s).

Additional costs apply for further services, including: sending for signing and receiving back documents to/from your nominated decision makers (from **\$125**); witnessing a document not prepared by Us (from **\$165**); receiving into Safe Custody an original document not prepared by Us (from **\$55**); additional signing/witnessing attendance not already provided for (from **\$165**); out of office attendance (from **\$165** plus travel time costs at **\$110** per hour); providing additional printed copies (from **\$11**); certified copies of documents (from **\$55**), posting documents on your behalf (from **\$55**); where our Lawyer(s) are appointed as an Executor in your Will (from **\$550**).

A fixed fee of \$385 will apply if we have an Initial Strategy Meeting with you but we are not further instructed to prepare documents, or you do not finalise your instructions with us within two weeks of your Meeting that enables us to prepare your documents.

Our Fixed Fee Costs are subject to the included work, time allowances and other conditions as outlined in detail by our Costs Agreement (which will be provided to you prior to you following your Initial Meeting and before any document preparation is undertaken).

All Further Work (including all attendances & communications) is charged on a time basis per our Cost Agreement, being an hourly rate divided into six-minute blocks. Hourly rates are currently \$550 for Principal Lawyer, \$440 for Lawyer & \$198 for Administration Assistant. Your costs will be discussed during the first meeting, but we advise a general estimate for further work in addition to fixed fees where applicable to be in the range of \$Nil to \$1,100.

The power of Testamentary Trusts

Testamentary Trusts (TT Wills) are a powerful estate planning tool that can provide taxation savings for your family after you die, protect your inheritance from risks such as bankruptcy or other claims (including increased protection in event of separation), and provide better control options for minor, immature or other vulnerable beneficiaries. They are not just for complex situations or significant wealth, and "keeping things simple" can often result in missed opportunities, and even lead to greater complexity, dispute and cost in the end.

[Please see our Testamentary Trusts brochure for further information](#)

When your circumstances may not be quite so 'Simple':

Our "Simple" Will option applies in limited circumstances, and in case of a TT Will, the "Standard" option may not always apply. Circumstances of greater complexity include:

- A blended family with children from a former relationship &/or step-children;
- Having executors and/or beneficiaries who reside overseas;
- A potential for estate claim (e.g. if you are estranged from &/or excluding or providing lesser benefit for a spouse, former spouse, child, step-child, &/or grandchild where their parent (your child) has predeceased you - whether or not you believe such person(s) are unlikely to make a claim);
- Your separation or contemplated separation from a partner;
- Consideration of or being already subject to a contract for mutual wills;
- Capacity issues anticipated or disputed;
- Beneficiaries with a disability, or vulnerable or unable to manage their inheritance;
- Uncertainty about your assets or having overseas assets;
- Any interest in a self-managed superannuation fund, a trust, a company, a partnership or other business interest (whether or not you consider those entities to be of nominal value and/or dormant);
- Your Will terms including:
 - A life interest or right of occupation or other more complex gift provision including a gift in relation to real property or on conditional terms;
 - Establishment of a fund or trust (and in the case of a TT Will, establishment of a fund or trust other than a TT);
 - In the case of a TT will, where more than minor variation is made to standard TT will terms;
 - More than two specific gift provisions, or where the subject of a specific gift is more than a simple cash gift or single item of personal property/vehicle;
 - More complex residual estate or multiple scenario residual estate provisions; or
 - Bespoke changes to the usual estate planning document structures and clauses used by us.

Where any of the above circumstances apply to you, the "More than Simple" Will surcharge (or for a Testamentary Trust Will, the "More than Standard" surcharge) will apply, however where several of these circumstances apply, or where complex drafting is required, the "Complex" surcharge will usually apply instead.

We will discuss your circumstances and confirm any applicable surcharges during our First Meeting.

Our Estate Planning packages are designed to cover all aspects of your estate planning to ensure all required matters have been considered and appropriately addressed, including consideration of your circumstances, providing you with comprehensive advice, and preparing documents to address all required matters – a complete “Estate Plan” for your security and protection.

- If you do not wish to have certain included documents prepared (including if you believe you have an adequate existing document), then you are welcome to opt out of that document type being prepared. Please note that the total package cost will usually still be applicable; in some limited circumstances your lawyer may consider whether any reduced fee can be offered.

- If you wish to have a single or limited documents prepared (other than a Will), please refer to those document types offered and the costs as outlined.

Where you want your existing Estate Planning documents to be reviewed and/or updated, and we did not prepare those existing documents, the same Estate Planning process (and costs) will apply as outlined. We would consider and review those existing documents (to be brought to the meeting or provided prior by you) in our Initial Meeting and advise you further as to recommended updates as a part of your overall Estate Plan. If you elect not to proceed with any document updates, the Initial Strategy Meeting fee will apply as above.

Where you want your existing Estate Planning documents (as prepared originally by us) to be reviewed and/or updated:

- Our same Estate Planning process (and costs) will likely apply as outlined. In limited circumstances your lawyer may consider whether any reduced fee can be offered, for example if it has not been very long since your previous documents, and there are no substantial changes to your circumstances or holdings, and where the updates to your existing documents are relatively minor in nature, and there are no other complexities.

- We would review your existing documents, get an update about your circumstances, consider the proposed changes (and make any other recommendations) in our Initial Strategy Meeting. We would advise you further as to any recommended updates as a part of your overall Estate Plan.

- As above, this Initial Strategy Meeting is included in your total costs if we proceed to preparing updated documentation on your behalf. Otherwise, the Initial Meeting fee will apply, unless a Review Meeting is provided for by your previous estate planning package - as is the case for most packages on or after 1 July 2025).