



Phone Wills – The Process

Phone Wills are another way to get your Estate Planning in order

Step 1: Preliminary background, objectives and fees

If you have been referred to us by a professional adviser or friend, they may have already provided us with some background information about you, and they may have provided you with an indication of our likely fees.

In our first phone call we will get some more information about you, including:

- Your personal circumstances, family, investments, and business (if applicable); and
- Your key objectives, i.e. how you would like to deal with your assets when you die, and who you would like to administer your affairs, etc.

When we have a good understand of your circumstances, and your key objectives, we can then provide you with a fixed quote to prepare your Wills and associated documents. If we provide you with some options, then we will indicate the fees for each option. If your affairs and objectives are straight-forward, we will be able to give you this quote on the phone. However, if we are offering you a number of options, we may also provide you a summary by email.

Step 2: Email further information

After our first phone call we may provide you with some additional information by email, for example:

- Some more information about Wills, Enduring Powers of Attorney, Advance Care Directives, and dealing with your super; and
- A detailed questionnaire about your personal and family circumstances, and the things you would like to achieve.

Step 3: Detailed instructions

We will then take detailed instructions from you as to your personal circumstances and your objectives. This will include things like the full names and addresses of your beneficiaries, who you would like to appoint to administer your affairs after you have died, and who will look after your children (if applicable).

We may take these detailed instructions in our first phone call, or we may phone you back when you have had the opportunity to consider and discuss the issues with your family.

If at this stage it becomes apparent that your affairs and objectives are more complex than we anticipated, and cannot be adequately dealt with over the phone, we will suggest that you come into our office to meet face to face. If this is likely to result in additional fees, we will let you know at this stage. If you decide not to proceed at this stage, no fee will apply.

Step 4: Prepare and provide draft documents

We will then prepare draft documents to put in place your estate planning objectives. We will provide the draft documents to you, together with a list of any further information or details that we require to finalise the documents.



We aim to provide you with draft documents within a week of receiving all the relevant information. However, if the documents are more involved, then this may extend to two weeks. When we send you the draft documents, we will also send you our invoice for our fixed fee.

Step 5: Review and clarification

You must then carefully review each document, and make sure we have correctly recorded all of your relevant details, and that the documents fully achieve your objectives. If you spot anything that requires changing you can tell us about this by phone or email.

We strive to make all of our documents as understandable as possible. However, if may be necessary to you to speak with us, or send us an email, for us to clarify the meaning of something.

Step 6: Finalise and sign documents

When you are happy with the documents we will then prepare a final set ready for you to sign. You may come into our office and have us ensure that the documents are properly signed by all of the relevant parties in our presence, or we can send you instructions as to how the documents must be signed and witnessed.

It is very important that estate planning documents are signed and witnessing correctly. Accordingly, if you have any doubts as to what must be done, then we strongly recommend that you come into our office to sign the documents and have them witnessed.

What next?

If you would like to speak to someone about putting in place a Phone Will, call us on **1300 654 590** or email us at wehelp@adlvlaw.com.au.

Further information can also be found on our website at www.adlvlaw.com.au.