CAIRNS MOBILE WILLS & PROBATE

M: 0448 048 840 | E: sally@cairnswills.com.au | W: cairnsmobilewillsandprobate.com.au

ESTATE PLANNING PRICE LIST

"I JUST WANT SOME INITIAL ADVICE"	
Stand-alone telephone or video conference for advice on estate planning without documents (up to 90 minutes)	$550 incl GST

"I JUST WANT A …"	FOR YOU	COUPLE
Basic will with no complicating circumstances	$880 incl GST	$1,760 incl GST
Enduring power of attorney only	$550 incl GST	$880 incl GST
Superannuation advice re: binding death benefit nomination and BDBN form only	$550 incl GST	$880 incl GST
Advance health directive (requires two visits)	$550 incl GST	$880 incl GST

ESTATE PLANNING ESSENTIALS PACKAGE	FOR YOU	COUPLE
Will, attorney documents, advance health directive (optional) and superannuation nominations (optional)	$1,540 incl GST	$2,750 incl GST

TESTAMENTARY TRUST WILL / SPECIAL DISABILITY TRUST WILL	FOR YOU	COUPLE
Will including one standard testamentary trust or special disability trust	$2,750 incl GST	$5,500 incl GST
Optional add on to your testamentary trust will "The Works" – add attorney documents, advance health directive and superannuation nominations	$550 incl GST	$880 incl GST

COMPLEX ESTATE PLANNING	FEES	OUTLAYS
Your estate planning requires comprehensive advice, will drafting involving bespoke testamentary trusts, complex gifting provisions, review of family trust deed and company documents, asset restructuring in collaboration with another lawyer, strategy advice in collaboration with your accountant/financial planner and nominations for your SMSF	$440 incl GST per hour	At cost

URGENT WILL INSTRUCTIONS	FEES	OUTLAYS
Urgent will instructions taken at hospital or bedside and, if possible, will prepared immediately (payment at time of appointment)	$2,200 incl GST	At cost

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"WOULD YOU LIKE SOMETHING EXTRA WITH THAT?" ADD ONS TO FIXED FEE WILLS AND/OR PACKAGES	
☐ Current title search (required for each property)	At cost price (currently $54.58 incl GST)
"IT'S COMPLICATED"	
Extra advice in meeting Add this option if: ☐ You have a former spouse, step-children or estranged children ☐ You are leaving someone out of your will ☐ A beneficiary lives overseas ☐ A beneficiary has a disability or cannot be trusted to manage their inheritance ☐ You have overseas assets	$220 incl GST Because this information is important and will change the advice provided (and may save your estate $1,000s!)
OTHER ADD ONS	
☐ Add on to your will ○ Enduring power of attorney ○ Superannuation advice and binding death benefit nomination ○ Advance health directive	$440 incl GST (per document)
☐ "Tricky / complex" clauses, for example: ○ Unequal distributions involving complex formulas ○ Right to reside clause ○ Option to purchase, conditional gift and other tricky clauses	$440 incl GST (per clause)
☐ Additional Zoom/telephone meeting or home visit (up to 90 minutes)	$440 incl GST
☐ Collaboration with your accountant/financial planner for the best strategy in relation to your SMSF death benefit nomination and succession plan (up to 30 mins)	$220 incl GST
☐ Peruse company constitution / family trust deed and report back current succession arrangements in documents (per entity)	$550 incl GST (per entity)
☐ Collaboration with your accountant/financial planner for the best strategy in relation to the succession plan for your family trust and company (up to 30 mins)	$220 incl GST
☐ If required: ○ deed of successor director / trustee / appointor ○ referral to update SMSF trust deed, company constitution / family trust deed	Estimate to be provided

Would you like fries with that?

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"I JUST WANT A SIMPLE WILL" THE DETAILS		
	JUST YOU	COUPLE
Basic will with no complicating circumstances This option is available for: ☐ a person who is single, never married, no children, gifting their estate to parents/siblings/friends ☐ a person who is legally divorced, gifting their estate to their children or, if no children, to parents/siblings/friends ☐ a couple with no children, gifting their estate to each other in the first instance, otherwise, to parents/siblings/friends ☐ a couple with a nuclear family (Mum, Dad and children), gifting their estate to each other in the first instance, otherwise, to their children	$880 incl GST	$1,760 incl GST Compare what really counts

What your fixed fee includes:

- Use of our online wills and estate planning platform to provide your information in the comfort of your home, prior to our meeting
- Initial meeting, up to 1 ½ hours, because it can take that long to ensure we receive all of the information needed to properly advise you
- PowerPoint presentation to assist in the education process
- A draft "basic" will (per person, second will is a reciprocal will)
- A further telephone/videoconference to discuss / explain your draft will, if required – because we need to make sure you understand what is in the draft will
- A letter enclosing your draft will
- A face-to-face appointment meeting to sign your estate planning documents if within the Cairns region (up to 1 hour) or instructions to enable you to sign your will in our absence
- Emailed copy of your signed will
- Presentation folder enclosing a hardcopy of your signed will via ordinary post

These steps ensure you receive quality documents that are right for you.

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ESTATE PLANNING – THE ESSENTIALS PACKAGE THE DETAILS		
	JUST YOU	COUPLE
Basic will with no complicating circumstances, attorney documents, superannuation nomination advice and, if applicable, binding death benefit nomination (optional), and optional advance health directive (optional)	$1,540 incl GST	$2,750 incl GST

What your fixed fee includes:

- Use of our online wills and estate planning platform to provide your information in the comfort of your own home, prior to our meeting
- Initial meeting, up to 1 ½ hours, because it can take that long to ensure we receive all of the information needed to properly advise you
- PowerPoint presentation to assist in the education process
- A draft "basic" will (per person, second will is a reciprocal will)
- A draft power of attorney, including specific additional powers required for the protection of you and your attorneys
- An advance health directive for you to complete with your doctor (optional)
- Advice regarding superannuation death benefit nominations for retail funds and, if applicable, draft binding death benefit nomination (excluding SMSFs)
- A further telephone/videoconference to discuss / explain your draft estate planning documents – because we need to make sure you understand what is in the draft estate planning documents
- Letters enclosing your draft estate planning documents
- A face-to-face appointment meeting to sign your estate planning documents if within the Cairns region (up to 1 hour) or instructions to enable you to sign your will in our absence
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ESTATE PLANNING TESTAMENTARY TRUST / SPECIAL DISABILITY TRUST WILL THE DETAILS		
	JUST YOU	COUPLE
Will including one standard testamentary trust or special disability trust	$2,750 incl GST	$5,500 incl GST
Optional add on to your testamentary trust will "The Works" – add attorney documents, advance health directive and superannuation nominations	$550 incl GST	$880 incl GST

What your fixed fee includes:

- Use of our online wills and estate planning platform to provide your information in the comfort of your own home, prior to our meeting.
- Initial meeting, up to 2 hours, because it can take that long to ensure we receive all of the information needed to properly advise you
- PowerPoint presentation to assist in the education process
- Will drafting (per person, second will is a reciprocal will)
- Letters enclosing your draft estate planning documents
- An appointment to discuss / explain your draft will – because we need to make sure you understand what is in the draft will
- Further will drafting, if required
- A further telephone/videoconference to discuss / explain your draft will – because we need to make sure you understand what is in the draft will
- A face-to-face appointment meeting to sign your estate planning documents if within the Cairns region (up to 1 hour) or instructions to enable you to sign your will in our absence
- Emailed copy of your signed estate planning documents
- Presentation folder enclosing a hardcopy of your signed estate planning documents via ordinary post
- Optional "The Works"
  - Draft power of attorney, including specific additional powers required for the protection of you and your attorneys (optional)
  - Advance health directive for you to complete with your doctor (optional)
  - Advice regarding superannuation death benefit nominations for retail funds and, if applicable, draft binding death benefit nomination (excluding SMSFs) (optional)

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TERMS AND CONDITIONS

We hate bill surprises as much as you.

We are dedicated to price transparency from the get-go.

That is why most of our services are provided on a fixed fee basis so there is no bill shock.

But there are some terms and conditions. Read on.

The advantages of fixed fee cost agreement

A fixed fee cost agreement enables us to provide you with an agreed price up front so you have certainty about the cost of our service.

Experience in the area of estate planning allows us to provide a fixed-fee price for wills and estate planning packages that are fair for you and our business.

When you engage our services, we will provide a cost disclosure notice that has a detailed description of the work to be performed for the agreed price.

The cost disclosure notice will also provide a description of services that are outside the scope of work and a description of foreseeable contingencies that might affect the scope of work and agreed price. As soon as we become aware that additional work is required or complications have arisen, you will be informed.

Acting for two people

Sometimes, we will be unable to act for a couple in wills and estate planning matters.

If the interests of both parties are not the same, we cannot act for both parties. This is because we cannot maintain our “loyalty” to both parties if their interests are adverse, or there is a conflict (or *potential* conflict) of our duties to act in the best interests of each party.

If it becomes apparent that we cannot act for both parties in our initial discussions, we will refer one of the parties to another solicitor.

If a conflict arises during the course of the matter and we cannot continue to act, both parties may be required to seek alternative representation.

Fixed fees published may be updated periodically

The fixed fees published on our website may be updated periodically, usually at the beginning of each calendar year.

The cost disclosure notice provided to each client at the commencement of a matter will contain the fixed fee applicable to each matter. Please notify us if there is a discrepancy between the fixed fees published on the website and in your cost disclosure notice.

If you do not wish to proceed after our initial meeting, please notify us within 24 hours of the initial meeting and you will be charged for “I just want some initial advice”.
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Payment for outlays into trust account

Payment of anticipated outlays are required to be paid into our trust account before they are incurred.

Cairns Mobile Wills & Probate law practice trust account
BSB 084 472
Account number 88385 5415
Ref: Your last name

Payments into our trust account are to be made by internet bank transfer or bank deposit.

To avoid the possibility of cyber-crime, please telephone us and we will send a return text confirming the BSB and account number prior to making an electronic payment.

Payment of your tax invoice

You can pay your tax invoice by internet bank transfer or using our Square card facility for credit cards and debit cards. Additional transaction fees apply if you use our Square card facility.

Our general account details:

JEST Hayward Pty Ltd
BSB 084 472
Account number 88 328 1204
Ref: Your last name

To avoid the possibility of cyber-crime, please telephone us and we will send a return text confirming the BSB and account number prior to making an electronic payment.

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