



Estate planning packages – 2020/2021 prices

	Document Solutions		Tailored Solutions	
	Basic	Essential	Summary	Complete
Individual price	\$500	\$1,100	\$1,750	\$2,600
Couple price	\$700	\$1,800	\$2,900	\$4,500
Documents included	Will (whether simple or including one or more testamentary discretionary trusts) Enduring power of attorney documents Template memo of directions To Do List			
Estate planning legal advice	+ Limited based on our online app and documented via To Do List + Couple package documents identical	No limit on estate planning advice and documented via To Do List *Depending on your circumstances, additional documents may be required to ensure your estate planning intentions are met and a fixed price quote will be provided if that is a case in relation to the preparation of such documents.		
Meetings	One (1) online meeting (max 2.5 hours and recorded for quality purposes)	Two (2) meetings (unlimited length)	Two (2) meetings (unlimited length)	Three (3) meetings (unlimited length)
Delivery of documents	Electronically for printing	Electronically for printing	Electronically and bound	Electronically and bound
Signing and witnessing assistance	For an attendance fee (\$250) Signing checklist provided	For an attendance fee (\$250) Signing checklist provided	Yes	Yes
Ongoing support	Assistance with how to complete a public/retail superannuation nomination	Basic Package inclusion + Up to 2 Title Searches for QLD properties	Essential Package inclusions + Provision of Summary Document explaining your current circumstances and estate plan (including use of diagrams and tables)	Summary Package inclusions + Assistance completing memo of directions + Provision of an electronic data-room for storage of your estate planning documents + Unlimited reasonable email and teleconference estate planning queries for one year from initial meeting
Payment terms	Payment required midway during online meeting via credit card (no surcharge applicable)	Invoice issued on provision of draft documents	Invoice issued on provision of draft documents	70% invoice issued on provision of draft documents 30% invoice issued on the earlier of signing of documents; or two months from first invoice
Entity review price	\$250 per entity			\$350 per entity
Entity review inclusion <i>Entity meaning a company, trust or 'SMSF'</i>	Review of entity governing documents and advice in relation to succession planning issues For trusts - preparation of trust succession documents (if no additional intermediary steps required) For companies - company statement search included and specific gift in Will (if required)			Summary Package inclusions Entity documents uploaded into electronic data-room
'BDBN' price	BDBN meaning binding death benefit nomination for self-managed superannuation funds – \$220 per BDBN			
Other considerations <i>Your estate plan may require additional documents and advice, such as (but not limited to):</i>	<ul style="list-style-type: none"> Restructuring personal and/or jointly held assets Restructuring trust and/or company structures Reviewing/preparing business and investment succession documents with unrelated parties 		<ul style="list-style-type: none"> Preparing documents mitigating any potential Will challenges Obtaining overseas estate planning advice Considering potential tax planning and asset protection objectives 	

Working out our fixed price to assist

Step 1: Pick the package that suits you

Unsure which package is right for you?

Pick **Basic** if you know what you want, our lawyer will only remind you of estate planning information and your ensure documents reflect what you want.

Pick **Essential** if you want to talk to a lawyer about the best way your Will should be prepared.

Pick **Summary** if you find value in having summary documents prepared to enhance the understanding of key points

Pick **Complete** if you want us to drive the estate planning process for you, for a stress-free experience

Step 2: Let us know how many entities you control that require consideration

Step 3: Appreciate that depending on your circumstances, additional documents may be required

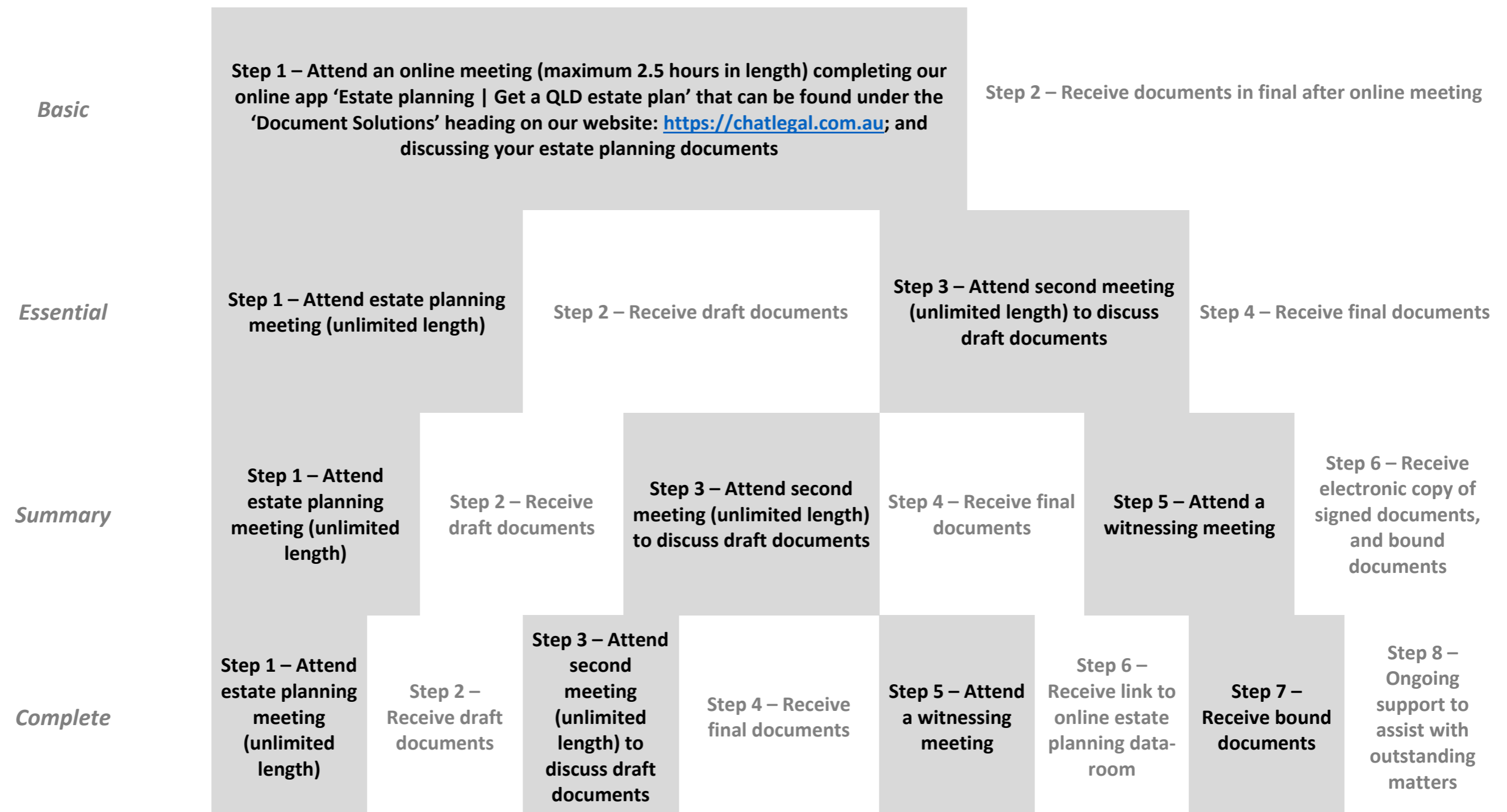
Step 4: Complete and arrange for the Instruction Form to be signed and provided back to us (electronic copy is fine).

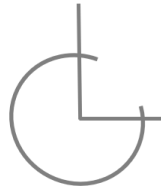
Our service agreement can be found at: <https://chatlegal.com.au/terms-service.html> | We specifically note that we do not retain original documents | The above fixed prices are inclusive of GST | | The above fixed prices are for estate plans that do not look to 'rule beyond the grave' (i.e. you are not looking to have pages of very specific, restrictive and unamendable rules in your documents) | You may always choose to 'upgrade' if you require additional assistance | We offer meetings during or after office hours and such meetings may either be in person (at our office during office hours or at a place convenient for you within 20km of Brisbane CBD anytime), online or by teleconference | We can undertake property searches for a fee of \$50 per search | Our attendance fee to assist with witnessing your documents is \$250 (as your Wills require two individual witnesses, and we are able to attend a location convenient for you, including outside office hours) | We can assist you with the documents and advice under the 'Other considerations' row for a fixed price; and any recommendations in relation to the need for such documents and advice will be provided to you as part of the estate planning process via the To Do List | If none of the above packages align with what you require, please contact us and we can arrange for a tailored estate planning package to be prepared and priced for you |



Estate planning processes

PACKAGES





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Instruction Form

Contact name	
Contact email	
Contact number	
Work	Wills and estate planning advice

If you would like us to proceed with the Work, please confirm the following (by completing the below and returning a copy of this instruction form and necessary documents to me – electronic copy if fine).

I/We

(Insert name of person/s requiring estate plan)

accept the terms of service found at <https://chatlegal.com.au/terms-service.html> in relation to the Work for the fixed price inserted below.

Level of service accepted and if for an individual or couple	Individual	Couple
	Basic	\$500
Essential	\$1,100	\$1,800
Summary	\$1,750	\$2,900
Complete	\$2,600	\$4,500
Number of entities you control	_____ (multiply by \$250/\$350 accordingly per entity)	
Total fixed price quote accepted	\$_____ (GST inclusive)	
Date		
Signature		