



olivetree
LEGAL



PACKAGES

THE ESSENTIAL PACKAGE

For people who just want the basics. This package assumes you do not have any interest in a private trust or company, or a SMSF. This package is suitable for people who do not have any overseas or interstate assets or foreign resident beneficiaries, and do not require any advice relating to estate planning for blended families or vulnerable beneficiaries. It does not include testamentary trusts.

Includes:

- + Initial strategy meeting
- + Preparation of Will/s (no special provisions)
- + Preparation of Enduring Power/s of Attorney
- + Final meeting with you to review and sign original documents or finalising documents and posting to you with signing instructions

Price inc GST Single: \$1,100.00 Couple: \$1,540.00

THE COMPLETE PACKAGE

Our most popular package.

This package is perfect for the discerning testator with some minor complexities (blended family, or existing trust/business interest), and people who would like to make use of a testamentary trust to provide asset protection and tax effectiveness for their beneficiaries. This package is not suitable for you if you have multiple entities and / or complex circumstances.

Includes everything in The Essential Package, plus:

- + One style of testamentary trust (that is, either a life interest, right to occupy, discretionary testamentary trust, protective testamentary trust or bespoke testamentary trust)
- + Estate Planning review of 1-2 existing entities (trust, company or SMSF) OR blended family advice
- + Liaising with your accountant and/or financial planner
- + Documentation to assist you with the completion of a DIY Advanced Health Care Directive
- + Documentation to assist you with the completion of a DIY Legacy Wishes document
- + My Legacy Folder

Price inc GST Single: \$1,650.00 Couple: \$2,750.00

THE DELUXE PACKAGE

This package is perfect for people with a higher level of complexity in their objectives or personal circumstances, which may be discussed in more detail at your initial strategy meeting. It is also the most commonly selected package for people who would like to include detailed instructions for after their passing.

Additional entities, bespoke provisions, foreign resident beneficiaries and overseas/interstate assets may involve additional fees which would be discussed during the strategy meeting.

Includes everything in The Complete Package, plus:

- + Multiple testamentary trusts
- + Review of 3-4 existing entities
- + Blended family advice
- + Assisted completion of Advanced Health Care Directive
- + Assisted completion of Detailed Legacy Wishes
- + Personalised My Legacy Folder

Price inc GST Single: \$3,520.00 Couple: \$4,400.00

INDIVIDUAL DOCUMENTS (DOCUMENT PRICE ONLY)

Initial strategy meeting	\$275.00
Single Classic Will	\$385.00
Couple Classic Wills (mirrored) <i>(total for 2 documents)</i>	\$660.00
Single Will establishing testamentary trust	\$1,100.00
Couple Wills (mirrored) establishing testamentary trusts	\$1,980.00
Enduring Power of Attorney (Medical) <i>single</i>	\$275.00
Enduring Power of Attorney (Financial) <i>single</i>	\$385.00
Enduring Powers of Attorney (Financial & Medical) <i>single package</i>	\$495.00
Enduring Powers of Attorney (Financial) <i>couples</i>	\$660.00
Enduring Powers of Attorney (Financial & Medical) <i>couples package</i>	\$880.00
Company Power of Attorney <i>per document</i>	\$550.00



ADDITIONAL CLAUSES / SUPPLEMENTARY SERVICES

(Please note that these prices are in addition to the base Will price as outlined above, however one single charge applies regardless of whether the Wills are for a single person or a couple)

RIGHT OF RESIDENCE OR LIFE INTEREST CLAUSE IN WILLS

A right of occupation provides a personal right for a person to continue to reside in property for a specified timeframe, or their lifetime. It is not transferable to another person, and has no monetary value. It is possible to include a provision allowing the recipient to transfer the right to a substituted property, depending on your wishes.

A life interest is an ownership right in something for life. This may be limited to a property, or may cover other assets as well (or instead). It allows the recipient to change the type of asset and receive any income generated by the asset. The recipient generally has more flexibility in the use of the asset(s), and there is a monetary value associated with this type of benefit. Limits can be placed on this, or the Will provisions may expressly extend the rights of the recipient, depending on your wishes.

These types of provisions are most commonly used in blended family situations.

Price inc GST \$385.00

(included in the Complete and Deluxe packages)

PROTECTIVE TRUST / PROVISIONS FOR DISABILITY OR MENTAL HEALTH CONCERN.

These provisions are included in the Will(s) to outline the intention of how funds are to be managed for the intended beneficiary while ensuring the funds remain protected from potential misuse or predators. They may contain bespoke provisions specific to your intentions and circumstances.

Price inc GST \$440.00

(included in Deluxe Package)

BLENDED FAMILY ADVICE AND STRATEGY OPTIONS (WRITTEN ADVICE)

Blended family advice and strategy options
From \$550.00 inc GST

REVIEW OF EXISTING TRUST DEED FOR SUCCESSION PURPOSES

Assets held by a Trust are generally not able to be directed to your nominated beneficiary/ies in a Will. If you have an interest in an existing Trust, we will need to review the terms of the existing Trust Deed(s) and supplementary documentation for estate planning purposes to determine whether the Will may have any impact on how control of the Trust can pass on your death. In some cases, supplementary documentation is required to ensure that assets in Trusts can pass in accordance with your objectives. We also need to check the recent accounts to see if there are any loans or unpaid entitlements, or any other element of the accounting which may have an impact on your estate plan. Please note that this review is limited to estate planning objectives only. It does not include a more general review of the trust or advice relating to any element of the trust's establishment or operation outside of this limited scope.

Price inc GST \$275.00 *per Trust*

REVIEW OF EXISTING BUSINESS STRUCTURE (COMPANY, PARTNERSHIP) FOR SUCCESSION PURPOSES

Review of Business Succession documentation including Company Constitution, Partnership Agreement, Shareholder Agreement, Unitholder Agreement for estate planning purposes. The review is limited to the impact of your business documentation on your estate plan, and does not include a more general review about the overall effectiveness or operation of the documents for business, tax, or structuring purposes.

Price inc GST \$275.00 *per document*

SUPERANNUATION

Review of Self Managed Superannuation Fund Deed, Variations and Binding Nominations, Reversionary Pensions or SMSF Will

Price inc GST - TBA

CREATION OF A SPECIAL DISABILITY TRUST (DURING LIFETIME)

This includes meeting with you to obtain instructions, preparation of the Trust Deed in accordance with the Centrelink Model Trust Deed, assistance with the MOD SDT form and Trustee Statutory Declaration, and liaising with Centrelink SDT Team for the approval of the Trust as an eligible SDT.

Price inc GST \$1,540.00

(may be included in Complete or Deluxe package)