

Estate Planning

Sam Sample	
Date of Last Will:	1st January 2010
Super Fund Binding Death Nomination Expiry:	Signed: 01/01/2020 Expires: 31/12/2023 (3-year binding nomination)
Pre-Paid Funeral Plan:	Yes

Executor/Power of Attorney

Client Name (s):	Executor Details	Power of Attorney (POA) Enduring	Power of Attorney (POA) Medical
Sam Sample	Sample Address Contact Number Email	Sample Address Contact Number Email	Sample Address Contact Number Email

Professional Contact/s




Solicitor:	XYZ Lawyers	Collins Street, Melbourne, 3008, Victoria, Australia Ph: 03 0000 0000 E: XYZLawyers@email.com
Accountant:	ABC Accountants	Collins Street, Melbourne, 3008, Victoria, Australia Ph: 03 0000 0000 E: ABCAccountants@email.com

Planned Events & Consideration

Year	Actions/Description	Note/Comment
2030	Children/Grandchildren gifting	
2033	Review Wills & POA	
2039	Update bequest list & pictures of valuables	

Estate Codicil List

Name:	Sam Sample
Address:	
Date of Birth:	

Item No.	For & Comments	Item Name	Photo/Description
1	My darling, Sally DaVinci. To remember our painting together.	Painting – Italian lady	
2	My son, Jackson Sample. To remember our cake cooking together.	Waterford Crystal cake stand	
3	To Charlie Brown. To remember our card games (and me winning!).	Lucky Uno playing cards	
4			
5			

Please note: This document is not an official estate document. To ensure your wishes are carried out, you should speak with your estate solicitor.

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