

Estate planning redefined



Don't wait until it's too late to get your affairs in order

Are you one of the 50% of Australians who don't have a will? We can help. Use the wealth portal's estate planning features to get organised.

Organise your estate

Keep your finances up to date, and upload your latest will and insurances so your loved ones know exactly where to find them. Your wealth portal's Protection area helps you keep track of all your estate planning documents.

If needed, speak to a professional

Should you have more complex estate planning wishes – overseas beneficiaries, a family trust, etc. – the Will Wizard will notify your finance professional so they can introduce you to a specialist law firm.

Get a will from the experts

Don't have a will? The Will Wizard asks a series of simple questions to assess your estate planning needs, then generates a will for you and your spouse from a template provided by estate planning law firm, View Legal.

Give your loved ones peace of mind

Once everything is in place, generate an **Executor Kit** – a summary document outlining your wishes and estate – so your executor has everything they need to carry out your will.

* Some of these features, like the Will Wizard and Executor Kit, need to be enabled and may come at an extra cost. Talk to us today for more information.

