

EVANS WILLS AND ESTATES LAWYERS

Jervis Bay · Shoalhaven, NSW

The Estate Planning Checklist

12 things every family should have in order

This checklist covers the essentials of a properly prepared estate plan under NSW law. It isn't a substitute for tailored legal advice, but it will show you exactly where the gaps are before something urgent forces the issue.

1. Your Will

- ☐ I have a current, signed and witnessed Will
- ☐ My Will reflects my current family situation (marriage, divorce, children, new grandchildren)
- ☐ I have named an executor I trust, plus a backup executor
- ☐ My Will has been reviewed in the last 3–5 years

2. Power of Attorney

- ☐ I have appointed an Enduring Power of Attorney for financial decisions
- ☐ My attorney knows where to find this document if needed
- ☐ I understand my attorney's authority only continues while I'm alive

3. Enduring Guardianship

- ☐ I have appointed an Enduring Guardian for medical and lifestyle decisions
- ☐ I have discussed my wishes for future health care with that person

4. Executors & Beneficiaries

- ☐ My chosen executor knows they've been appointed and is willing to act
- ☐ My beneficiaries are clearly and unambiguously identified
- ☐ I've considered what happens if a beneficiary dies before me

5. Superannuation & Death Benefit Nominations

- ☐ I have a binding death benefit nomination on each super fund
- ☐ My nomination is still valid (many lapse after 3 years)
- ☐ My super nominations align with — not contradict — my Will

6. Assets Outside Your Will

- ☐ I've listed jointly owned property and how it's held (joint tenants vs tenants in common)
- ☐ I've identified any assets held in a trust or company structure
- ☐ I've considered digital assets — online banking, crypto, photos, subscriptions

7. Protecting Against Disputes

- ☐ I've considered whether any family member may have grounds to contest my Will
- ☐ I've documented my reasons if I'm leaving someone out or treating beneficiaries unevenly
- ☐ I've reviewed my estate plan after any major life change

Ticked fewer boxes than you'd like?

That's exactly what we help local families sort out — with fixed fees and a 5-day turnaround. Book a consultation and we'll walk through your checklist together.

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