



ESTATE PLANNING AND LEGAL

Your Estate Planning Check List

Consider The Following Questions:

Do you have a valid Will?

Has it been viewed/updated since the last significant event in your life?

Does your Will provide adequate protection to ensure your assets are not diminished?

Do you know how much money your family would need if you were to die today?

Do you have a funding strategy in place?

Are you and your family financially protected if you were to suffer a serious illness/injury?

Are you and your family financially protected if you were to become totally and permanently disabled?

Do you know how much money you and your family would need if you were unable to work, or you suffered a serious illness/injury?

Do you have income replacement cover?

Are the protection measures you have in place sufficient for your familys needs?

Have you appointed someone to look after your affairs if you die or become incapacitated?

If you are a business owner, have you considered exit strategies from your business?

If you are a business owner, have you planned for the future of your business if you pass away?

If the answer to any of the above questions is NO, then it's possible you have a gap in your estate planning needs.

Contact us to get professional advice.

If you would like to take advantage of our free consultation or would like to know more about our services please contact us on (07) 3832 6020,
Email info@bridgewaterafs.com.au
or visit our website on
<http://www.bridgewaterafs.com.au>

Disclaimer: This document has been prepared for general information purposes only. Any advice contained in this document is General Advice which has been prepared without taking into account any of your objectives, financial situation or needs. Before acting on any General Advice you should consider the appropriateness of the advice by having regard to your own objectives, financial situation and needs.

Although every effort has been made to verify the accuracy of the information contained in this document, the Licensees, their officers, representatives, employees and agents disclaim all liability (except for any liability which by law cannot be excluded), for any error, inaccuracy in, or omission from the information contained in this document or any loss or damage suffered by any person directly or indirectly through relying on this information.

Bridgewater AFS is a Corporate Authorised Representative No 331983 of WealthSure Pty Ltd AFSL No 238030 ABN 93 097 405 108

Level 1, 346 Turbot Street • PO Box 10144, Adelaide Street • Brisbane QLD 4000

Telephone: 07 3832 6020 • Facsimile: 07 3832 6018 • info@bridgewaterafs.com.au • www.bridgewaterafs.com.au

Bridgewater AFS Corporate Authorised Representative No 331983 • Licensee: WealthSure Pty Ltd AFSL No 238030 ABN 93 097 405 108