



SOUTHERN WATERS  
L E G A L

Planning for the

FUTURE



## Estate Planning

Southern Waters Legal provides holistic Estate Planning services. We take the time to understand our clients unique circumstances before we apply our detailed understanding of the law in relation to Wills, incapacity, trusts, business and investment structures, family law, asset protection, tax and superannuation.

We provide legal structures that allow for the successful management and ultimate transfer of our clients' assets in a manner that ensures legal protection of family assets, is tax effective, and that minimises estate litigation.

# Estate Planning

We can implement an effective holistic Estate Plan which considers:

## Asset Protection

Structuring the ownership of your assets and your inheritance can legally protect assets from potential creditors.

## Will

A correctly structured Will can provide asset protection and taxation advantages for your beneficiaries. Does your Will do this?

## Power of Attorney

Granting someone a Power of Attorney means you grant them the power to deal with your legal and financial affairs.

## Health Guardian

Your Guardian can make medical and lifestyle decisions for you if you are unable to do so.

## Children's Guardians

If something happens to you and your partner, a Guardian is required to look after your children. Will they know what to do?

## Controlled Entities

Did you know assets held by external entities like companies, trusts and self-managed super funds may not be covered by your Will or Power of Attorney?

## Superannuation

Did you know your Superannuation is not automatically governed by your Will?

## Reducing Tax

No one wants to pay too much tax. Certain structures provide greater taxation benefits than others. Let us help you create the most beneficial structure for your circumstances.

## Will Protection

Want to leave someone out of a Will? There are ways and means you can use to minimise their chances of making a successful claim.

## Business Exit

A correctly structured business exit strategy can save thousands of dollars in tax.

## Review

You may have an Estate Plan or just a Will but does it reflect your current circumstances and wishes?

## How we look after your Estate Planning

