

ESTATE PLANNING FEE SCHEDULE

	<u>INDIVIDUAL</u> <u>COUPLE</u>	
Simple Will*:	\$374	\$693
Straightforward will (for example):		
<ul style="list-style-type: none"> ➤ Basic, direct gifts to family members ➤ Modest assets, simple affairs and few beneficiaries 		
Custom Will:	\$671	\$1,089
Customised will (for example):		
<ul style="list-style-type: none"> ➤ More complicated or numerous gifts ➤ Clients who want a 'simple' will but have complex lives (such as blended families, business owners etc) ➤ Unusual or custom provisions or wishes 		
Sophisticated Will:	\$880	\$1,386
Complex will (for example):		
<ul style="list-style-type: none"> ➤ One or more testamentary discretionary trusts ➤ Trusts for vulnerable beneficiaries ➤ Review of 'non-estate' asset structures (family trusts, SMSF etc) 		
Basic Will Update/Amendment*:	\$154	\$286
<ul style="list-style-type: none"> ➤ Very simple change to existing will ➤ Only available to existing clients 		
Enduring Power of Attorney ("EPA")*:	\$154	\$286
Appointing representatives to act in financial matters on your behalf		
Advance Care Directive ("ACD")*:	\$154	\$286
Appointing representatives to act in health and lifestyle matters on your behalf and enabling you to make decisions about your care in the event you become unable to do so		

PACKAGE FEES				
	Will plus EPA OR ACD		Will plus EPA AND ACD	
	INDIVIDUAL	COUPLE	INDIVIDUAL	COUPLE
Simple Will*	\$462	\$803	\$484	\$836
Custom Will	\$748	\$1,199	\$770	\$1,232
Sophisticated Will	\$968	\$1,606	\$990	\$1,639

*Discount of 10% for seniors (standard documents only)

Standard Terms & Conditions on following page

ESTATE PLANNING FEE SCHEDULE – STANDARD TERMS & CONDITIONS

1. All fees set out in this Fee Schedule are:
 - 1.1. Current as at 8 April 2019;
 - 1.2. Subject to change without notice (we will endeavour to publish a new Fee Schedule as soon as any change to our standard fees is implemented);
 - 1.3. GST Inclusive; and
 - 1.4. Indicative only. We will settle a final fee for your service with you when we have your complete instructions.
2. The fees set out in this Fee Schedule are on the basis that:
 - 2.1. You (and your advisers) provide full and specific details when requested by us;
 - 2.2. Our work is limited to:
 - 2.2.1. An initial meeting to take instructions;
 - 2.2.2. One or two brief attendances (by telephone or email) to clarify details and instructions;
 - 2.2.3. Preparation and provision of draft documents and minor amendments or alterations;
 - 2.2.4. A meeting with you to discuss and execute documents; and
 - 2.2.5. Providing original and copy documents to you and storage of your original documents.
3. We reserve our rights to charge a higher fee for your service than the fees set out in this Fee Schedule if:
 - 3.1. We ascertain during the course of your matter that your circumstances or needs will be outside of the standard definitions we have contemplated in this Fee Schedule; or
 - 3.2. During the course of our engagement, it becomes clear that work outside of the scope set out in paragraph 2 above is expected, for example:
 - 3.2.1. numerous or unusually lengthy meetings;
 - 3.2.2. significant changes to your of instructions; and
 - 3.2.3. meeting you outside our office to take instructions or to execute documents.
4. If the service you require does not fit within the standard definitions or the standard packages set out in this Fee Schedule we will endeavour to provide an individual quote to you before we commence work. Where we have not provided a “fixed fee” quote for our work we will charge in accordance with the Higher Courts Scale of Fees (as amended from time to time).
5. Any out-of-pocket costs (‘disbursements’) will be charged in addition to the professional fee charged for your service. Common examples of these costs are property title searches, company searches or similar information gathering expenses. No unusual or large disbursements will be incurred without your express authority.
6. If you decide not to proceed with your matter after our initial meeting we reserve the right to charge:-
 - 6.1. A fee for our initial meeting; of \$143 (inc GST) where the meeting is half-an hour or less, and \$341 (inc GST) for up to an hour; and
 - 6.2. fees calculated in accordance with the Higher Courts Scale of Fees (as applies from time to time) for any other work we have done in good faith in accordance with your instructions.