
Legal Health Check Questionnaire

Complete the following questionnaire and call us for your complimentary half hour consultation to make sure you are in good shape.

Estate Planning

If you die without a will (intestate) the estate laws within each state determine how your assets are divided and distributed. It is preferable that you make that decision, not the State. If you and your family were to all die together, and you did not have a will, the State could become the beneficiary of all that you have worked during your lifetime.

Wills

1. Do you have a Will? Yes No
2. If you have a Will has it been reviewed in the last 3 years? Yes No
3. Do you remember the name of your executor? Yes No
 - a. Have you appointed a Guardian for your Children in your Will? Yes No

Power of Attorney & Enduring Guardianship

4. Do you have a Power of Attorney? Yes No
5. Have you heard of or do you have an Enduring Power of Attorney Yes No
6. If you were facing a serious operation or medical procedure is there anyone that you would to appoint to make decisions for you if you are not physically or mentally fit to take part in the decision making? Yes No

Legal Health Check Questionnaire continued...

7. Would you want someone to decide where you live and who will provide you with medical attention? Yes No
- a. Would you want to put that in writing? Yes No

Self-Employed & Business Owners

8. If you are self-employed and have a business partner, do you have an agreement to cover your share of the business in the event of death or permanent disability to either of you? Yes No
9. Do you have a family company or trust or investment scheme or project which you now control? Yes No
10. If you were to lose your faculties or die tomorrow is there anyone ready to take over? Yes No
11. If you have children and you and your spouse were both to die is there anything to ensure that all of your children will benefit equally in the business or shares that you would want them to have? Yes No

If you answered 'NO' to any of these questions we urge to contact us for further information on how we can help!

To book your complimentary appointment call CCL on telephone **02 4627 9933**.