



Estate Planning

Ensure your assets are passed onto your loved ones and beneficiaries in the most financially efficient and tax effective way possible.

Estate planning is more than just preparing a valid will. Many assets that a client controls will not even form part of his/her estate.

Estate planning has three main objectives:

- Transferring ownership and control of assets to the people who the deceased person would like to benefit from those assets
- Minimising income and capital gains tax upon transfer or eventual sale of the assets
- Protecting assets from actions or legal proceedings taken against any of the beneficiaries, such as bankruptcy or divorce.

Clients will face a myriad of issues in estate planning. For example, they may be concerned that some of their assets are lost by careless children or unscrupulous in-laws.

Strategies are available using both testamentary trusts and superannuation to protect assets and reduce the tax payable on income earned from those assets.

Wills can also be drafted to limit control of assets and the time at which a person will inherit those assets. Control of family trusts and private companies may also be transferred through a properly drafted will.

However, estate planning isn't only about planning for death. It also involves considering how assets and financial decisions will be made when a person loses their physical or mental capacity to make such decisions.

A good estate plan can provide peace of mind to clients, and minimise complications for their beneficiaries.

How we can help you

We can help you work through your estate planning needs to create a comprehensive plan to ensure your loved ones are protected.

Interested in talking to us?

Please contact one of our financial advisers to organise a complimentary consultation to discuss your estate planning needs.



Craig Wilford
Partner - Authorised Representative
Certified Financial Planner
Nexia Sydney Financial Solutions Pty Ltd



Sylvia Liang
Partner - Authorised Representative
Certified Financial Planner
Nexia Sydney Financial Solutions Pty Ltd



Christine Atencia
Authorised Representative
Certified Financial Planner
Nexia Sydney Financial Solutions Pty Ltd