PREPARING TO MAKE YOUR WILL AND POWERS OF ATTORNEY

At your initial appointment, your lawyer will take the time to understand circumstances take instructions for your Will and Powers of Attorney.

To make the most of your appointment time and ensure your Will and Powers of Attorney reflect your wishes, we ask you come prepared with some key information. The below is a guide to help you prepare.

PERSONAL DETAILS

We will ask you for your:

- Full legal name
- Address and contact details
- Date of birth
- Marital status (married, de facto, separated, divorced)

We will also ask to sight your identification so that we can verify your identity.

Please ensure that you bring along:

- ☐ Your Drivers Licence OR
- ☐ Another form of photo identification.

WILL

FAMILY INFORMATION

We will discuss your family circumstances to properly understand your situation and ensure your Will reflects your wishes.

Please bring details of:

- ☐ Your spouse or partner
- ☐ Your children (including stepchildren)
- ☐ Any other dependants
- ☐ Grandchildren (if relevant)

EXECUTOR(S)

You should consider who you wish to appoint as your executor and carry out the terms of your Will - many people choose a spouse, adult child, trusted friend, or professional.

Please bring details of:

- ☐ Full legal name(s) of your chosen executor(s)
- ☐ Their relationship to you
- ☐ Address and contact details for each executor

BENEFICIARIES

Please consider who you wish to benefit from your estate and how your assets are to be distributed between them.

Bring:

- ☐ Full legal names of any beneficiaries
- ☐ What you want each beneficiary to receive

YOUR ASSETS AND LIABILITIES

You don't need exact values, but a general list of your assets and liabilities helps.

This may include:

- ☐ Property (home, investment properties)
- ☐ Bank accounts
- ☐ Shares or investments
- ☐ Superannuation
- ☐ Vehicles
- ☐ Businesses or business interests
- ☐ Valuable personal items (jewellery, art, heirlooms)
- ☐ Any entities such as companies, family trusts, unit trusts and self-managed superannuation funds
- ☐ Liabilities such as mortgages, loans and guarantees

SUPERANNUATION AND LIFE INSURANCE

These often sit outside the Will, but your lawyer will want to know:

- ☐ Your super fund
- ☐ Whether you have a binding death benefit nomination
- ☐ Any life insurance policies

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GUARDIANS FOR CHILDREN (IF UNDER 18)

If you have minor children:

- ☐ Who you wish to act as guardian if something happens to you
- ☐ Their full legal name(s) and contact details

FUNERAL WISHES (OPTIONAL)

Some people include:

- Burial or cremation preference
- Any specific requests

ANY PREVIOUS WILLS

If you have them, please bring copies of any previous Wills or estate planning documents, including Powers of Attorney.

POWERS OF ATTORNEY

As part of your estate planning, we will usually prepare:

- an Enduring Power of Attorney (for financial and personal matters), and
- an Appointment of Medical Treatment Decision Maker (for medical decisions).

These documents appoint trusted persons to make decisions on your behalf, either immediately or in the event you lose the capacity to make those decisions yourself.

ENDURING POWER OF ATTORNEY

An Enduring Power of Attorney allows you to appoint one or more people to make decisions about your financial and personal matters.

Examples include operating bank accounts, paying liabilities, dealing with real estate and making personal decisions about your living arrangements.

Please consider:

- ☐ Who you would like to appoint as your attorney(s)
- ☐ Whether you want to appoint more than one person

If appointing more than one attorney, consider whether they should act:

- Jointly (they must act together)
- Jointly and severally (they can act together or independently)
- By majority – where more than two attorneys are appointed, decisions can be made if a majority of them agree

Please bring:

- ☐ Full legal name(s) of your proposed attorney(s)
- ☐ Their relationship to you
- ☐ Address and contact details for each attorney
- ☐ Their dates of birth

Please consider whether you would like to appoint substitute attorneys in case your first choice is unable to act.

APPOINTMENT OF MEDICAL TREATMENT DECISION MAKER

An Appointment of Medical Treatment Decision Maker allows you to nominate someone you trust to make medical treatment decisions on your behalf if you are unable to do so.

This person may be asked to make decisions about:

- Medical treatment
- Life-sustaining treatment
- Access to medical information

Please consider who you would like to appoint as your Medical Treatment Decision Maker.

Please bring:

- ☐ The full legal name of your proposed decision maker
- ☐ Their relationship to you
- ☐ Address and contact details
- ☐ Their date of birth

You should consider appointing an alternative Medical Treatment Decision Maker if your first choice is unable or unwilling to act.

WHAT HAPPENS NEXT

After your first meeting, your lawyer will prepare the draft documents based on the instructions you have provided.

We will then arrange a second appointment where your lawyer will go through the documents with you, explain how they operate, and ensure they accurately reflect your wishes.

If everything is in order, the documents can then be signed and properly witnessed at that meeting.

At the signing appointment, you will also be provided with a folder containing copies of your estate planning documents, together with an Executor's Guide. This guide can be completed by you with details of your assets, accounts and other important information. It is designed to be kept safely with your personal documents at home and can assist your executor(s) in locating relevant information and administering your estate when the time comes.

MEET THE TEAM

When it comes to protecting your family's future, personal succession planning is key. At Beck Legal we specialise in Wills and Estate Planning with tailored structures that ensure beneficiaries are adequately and fairly taken care of. We consider family circumstances, special needs, disputes between beneficiaries and protection against third party creditors to ensure your intentions are secured. The team at Beck Legal are committed to your future planning.

NATHAN SCOTT

DIRECTOR - COMMERCIAL AND SUCCESSION PLANNING LAWYER

Nathan Scott is a Director at Beck Legal and leads the Succession Law, Wills and Estates team across our Bendigo and Swan Hill offices.

With over a decade of experience, he is a trusted adviser to successful businesses and farming families, providing clear, strategic guidance on succession and estate planning, as well as related property and commercial matters.

He works collaboratively with accountants, financial planners, and other advisers to implement practical structures that protect assets and support future generations.

SHAY COLLINS

ASSOCIATE – WILLS AND ESTATES LAWYER

Shay Collins is an Associate Lawyer at Beck Legal practising in the Wills and Succession Planning team. She focuses delivering tailored estate planning advice, with careful consideration of how decisions made during a person's lifetime will operate in the administration of their estate. Shay works closely with individuals and families to provide clear, practical guidance, ensuring their wishes are properly documented and their assets are protected.

Shay began her legal career in Beck Legal's litigation team, where she gained valuable experience in testator family maintenance claims and estate disputes. This experience informs her approach to estate planning, enabling her to assist clients to put thoughtful, well-structured plans in place to manage their affairs and protect their legacy.

KASHARNI LEHMANN-MCCALL

ASSOCIATE – WILLS AND ESTATES LAWYER

Kasharni Lehmann-McCall is an Associate Lawyer in the Wills and Succession Planning team at Beck Legal. With a strong commitment to guiding clients through each stage of the Will process, Kasharni takes the time to work alongside clients and their financial advisers to thoroughly understand their individual, family, and financial circumstances. She approaches every conversation with clarity and compassion, appreciating how personal and sensitive planning a Will can be.

Kasharni ensures clients feel supported and well-informed as they make key decisions about their legacies. Her aim is to deliver tailored advice that honors her clients' wishes, safeguards their assets, and helps families achieve lasting peace of mind for the future.

ZOE SPENCE

GRADUATE LAWYER – WILLS AND ESTATES

Zoe Spence is a graduate Wills and Estates Solicitor working across the Swan Hill and Bendigo offices, with experience in both estate planning and estate administration. She is committed to helping clients feel confident their affairs are in order at every stage of life, taking a holistic, client-focused approach to ensure each will reflects what matters most, now and into the future. Having grown up in Swan Hill, Zoe understands the unique needs of individuals and families in rural communities, including the complexities of family-operated businesses and intergenerational planning.

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