

# Estate Planning

## SCOPE AND QUOTE REQUEST

I agree to the legal hub terms and conditions  Yes  No  
Would you like to use the legal concierge service?  Yes  No

### ADVISER DETAILS

Adviser name\*  Practice name\*   
Adviser contact phone number\*  Adviser email address\*

### CLIENT DETAILS

How many clients?\*

#### CLIENT 1 (EG. HUSBAND)

Title\*  Surname\*  First name\*  Middle names   
Date of birth\*  Marital Status\*  Occupation\*   
Married  Single  Defacto  Divorced   
Residential address\*   
Is postal address same as residential?\*  Yes  No  Postal address\*   
Best contact number\*  Email\*

#### CLIENT 2 (EG. WIFE)

Title\*  Surname\*  First name\*  Middle names   
Date of birth\*  Marital Status\*  Occupation\*   
Married  Single  Defacto  Divorced   
Are your contact details different to Client 1?\*  Yes  No   
Residential address\*   
Is postal address same as residential?\*  Yes  No  Postal address\*   
Best contact number\*  Email\*

## CHILDREN

Do you have any children?\* Yes No

Please enter full name and date of birth of children

Are any of the children listed above not from this relationship?\* Yes No

More details

Are there any current wills?\* Yes No

Do those wills have testamentary trusts?\* Yes No

Are there any power of attorneys in place?\* Yes No

Approximate total assets

Approximate total liabilities

Does the client have any structures?\* Yes No

Which ones? Companies Trusts SMSF Partnership Other

\*\*Legal Hub recommends reviewing the documents of any entity the client has an interest in or control of to ensure they meet the client's estate planning objectives.

## SPECIFIC OBJECTIVES

Please advise any specific objectives – concern for children's relationships, disabled child, specific gifts etc.

Please email this form and any relevant documents to [info@thelegalhub.com.au](mailto:info@thelegalhub.com.au).  
If you have any current wills or additional supporting documentation, please attach.