

SMSF HEALTH CHECK

PART C – ESTATE PLAN



NAME OF FUND:	
TRUSTEE/MEMBER:	
DATE COMPLETED:	

The purpose of the SMSF Estate plan is to ensure the surviving SMSF trustees or the replacement trustees (Legal Personal Representatives) have specific instructions from each member as to their wishes should a death event occur. Many trustees falsely assume their superannuation benefits will automatically be paid to their estate on death. This is not the case! With an increasing amount of wealth ending up into SMSF's it's vital each member clearly articulates their SMSF estate plan to the trustees. Trustees can now create a SMSF WILL inside their SMSF trust deed and governing rules.

So we can understand what the current instructions are for each member, please provide a brief response to the following questions:

1. As a member of the fund have you provided written instructions to the trustees outlining your estate planning instructions? If so list below.
2. What is important to you in the event of your sudden death?
3. What is important in looking after your family financially upon your death?
4. Who do you want to allocate your member's super benefit in the event you pass away? And in the event you and your surviving spouse (if applicable) pass away together? (Adult children, Minor children, the estate?)

