

Butler McIntyre & Butler

*Excellence in law
since 1824*

Wills & Succession Planning



Guided solutions for a successful future



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What is succession planning?

It plans for the transition of your assets and responsibilities to the people you care about. It involves making clear arrangements for the transfer of wealth, property, and family businesses to avoid disputes, protect financial wellbeing, and preserve your legacy. It provides peace of mind for you and your loved ones, ensuring everyone's future is protected with clarity and fairness.



What can BMB assist with?

Butler McIntyre & Butler prides itself on helping our clients achieve their goals. Our role is to both advise on and ensure that your succession plan is properly implemented. In this regard we can:

- help you to form your succession plan by providing legal advice and coordinate expert advice from your other trusted advisors;
- draft the documentation which will ensure that the succession plan is properly implemented;
- safely store your personal documentation;
- assist you to explain to those that you love what the plan is and what it means for them; and
- assist with the administration of an estate following death.

Why use BMB?

With over 200 years of history in the Tasmanian community, Butler McIntyre & Butler has the necessary expertise and knowledge to ensure that your succession plan is fit for purpose and legally compliant.

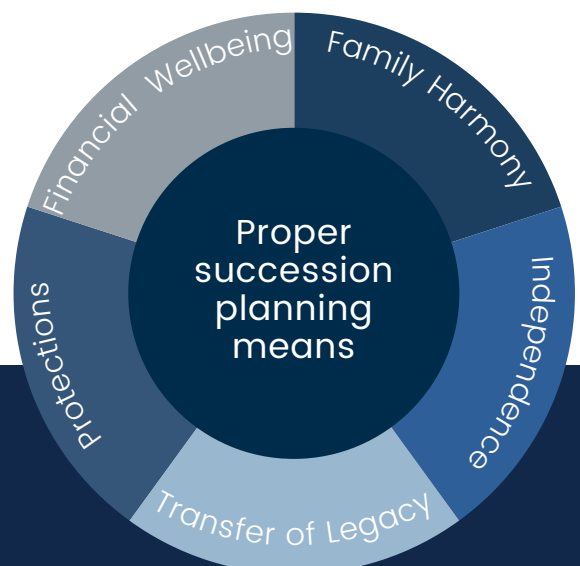
The legal issues raised by succession planning are often technical. Without experience, mistakes can be made making the process of administering your estate more complex than it should be and leading to undesired results.

Key Documents

- Wills
- Powers of Attorney
- Enduring Guardianships
- Superannuation death benefit nominations
- Advance Care Directives
- Trust Deeds

When to revisit your estate plan

- Commencing or ending a significant relationship or marriage
- Birth of a child
- Death of a family member
- A significant health issue
- Purchase or disposal of a major asset
- Establishing or restructuring entities



What is the process?

Once clients have decided that they wish to proceed with their estate plan, they would contact our office to make an appointment to discuss their affairs with one of our lawyers. We can assist with simple and complex succession planning. Prior to the meeting we will provide you with an information letter which outlines items for consideration and documents to bring along.



What do I need to do?

At the outset of your succession planning process, consider your goals, and those of your loved ones, for the short, medium and long term.

Once you are ready to discuss your succession planning requirements, we recommend you approach Butler McIntyre & Butler and other professional advisors such as your accountant and financial planner (where necessary). There is no need to have a finalised plan before you meet with us - we will guide you through the process.

By consulting your advisors at an early stage your planning can take into account their comments and test the plan to ensure it will achieve the desired outcome. The plan should then be implemented by appropriate documentation.

Who should be involved?

A well prepared succession plan will almost always involve communicating, at least in a general way, with all of those people that will be affected by the plan. Ideally these people will be involved with preparing the plan. Butler McIntyre & Butler also advocates for early input from your professional advisors. By doing so your plan is prepared with the benefit of understanding your options and the requirements to properly implement the plan.

Why be proactive?

The consequences of failing to properly implement a succession plan can cause turmoil to those that are left to administer your affairs. Often this is at a time when your family needs certainty.

The result can also be different to what you expected and wanted. Lack of proper succession planning can distress your family and diminish their financial wellbeing.

Administering an Estate after death

Butler McIntyre & Butler has the knowledge and expertise to assist you to administer both simple and complex estates.

This includes obtaining grants of probate or letters of administration, assisting with the sale of assets and real property, and distributing the estate in the most effective and lawful manner.

Secure your future with us today

About BMB

20 Murray Street
Hobart TAS

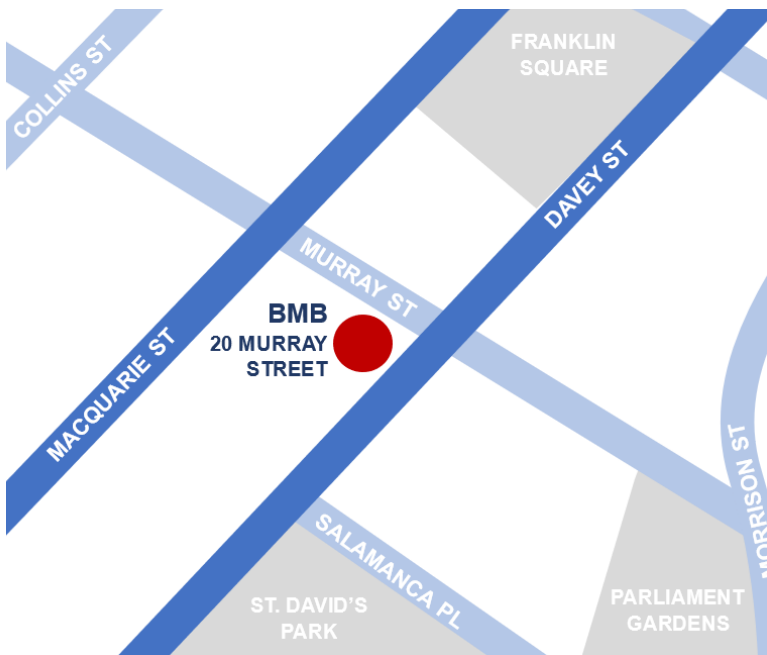


Key Contacts

Estate Planning and Administration

- Con Tsamassiros Partner
- Shelby Llewellyn Partner
- Amelia Hurd Snr Associate
- Ryan Hartigan Associate
- Chris Pearn Lawyer
- Allison Nairn Lawyer
- Amanda Sinclair Probate Clerk
- Joeleen Wilson Probate Clerk

Butler McIntyre & Butler is a medium sized independent Tasmanian legal firm. Its offices in Hobart are situated in the centre of the city, close to the Supreme Court of Tasmania at 20 Murray Street, Hobart. In Hobart, the name Butler McIntyre & Butler has been synonymous with high quality legal services for over 200 years. In fact, established in 1824, it is the oldest law firm in Tasmania. Butler McIntyre & Butler promotes an umbrella of high quality legal services through an experienced and capable team of solicitors and support staff. A central theme of Butler McIntyre & Butler is to provide its clients with an efficient, cost-effective and expertly delivered legal service which is tailored to their particular needs.



Further queries?

Do not hesitate to contact our friendly team to further discuss your succession planning needs or visit our website for further information.

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Secure your future with us today