

Pro Forma A Estate Planning Diagrams (6 Masters)

A full A4 size master of each of the three Diagrams below, are on the next three pages.

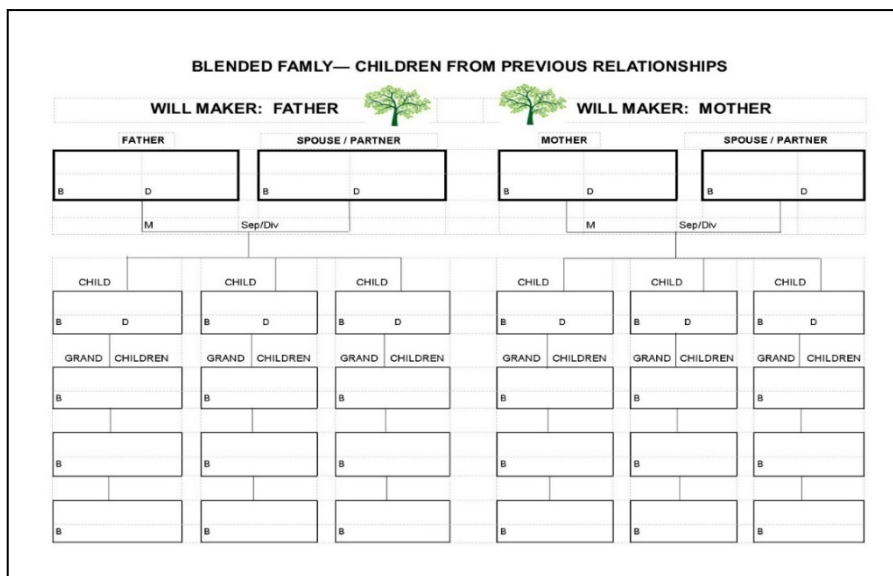
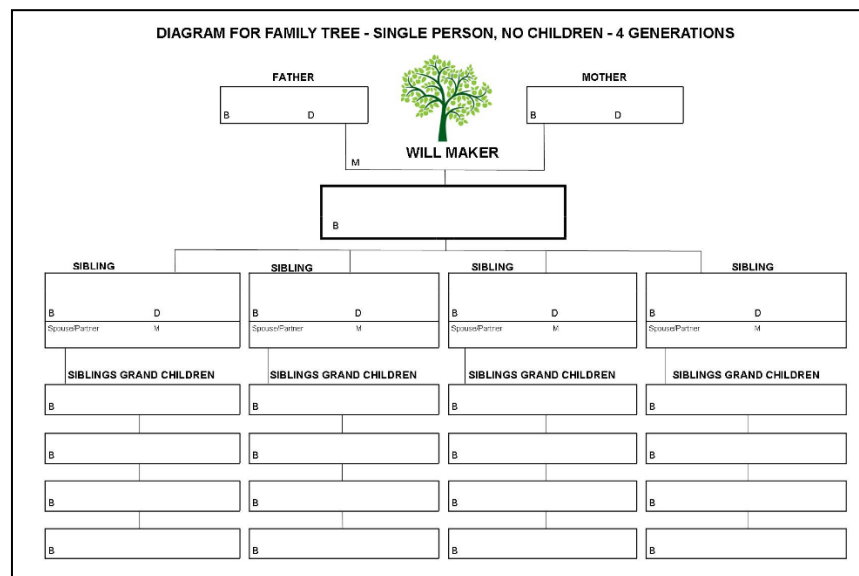
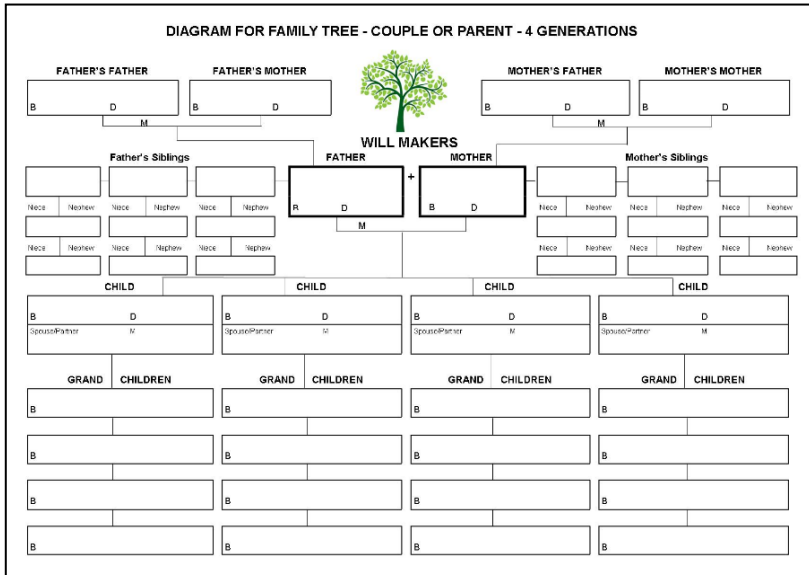


Diagram for Family Tree – Couple or Parent – 4 Generations



WILL MAKERS

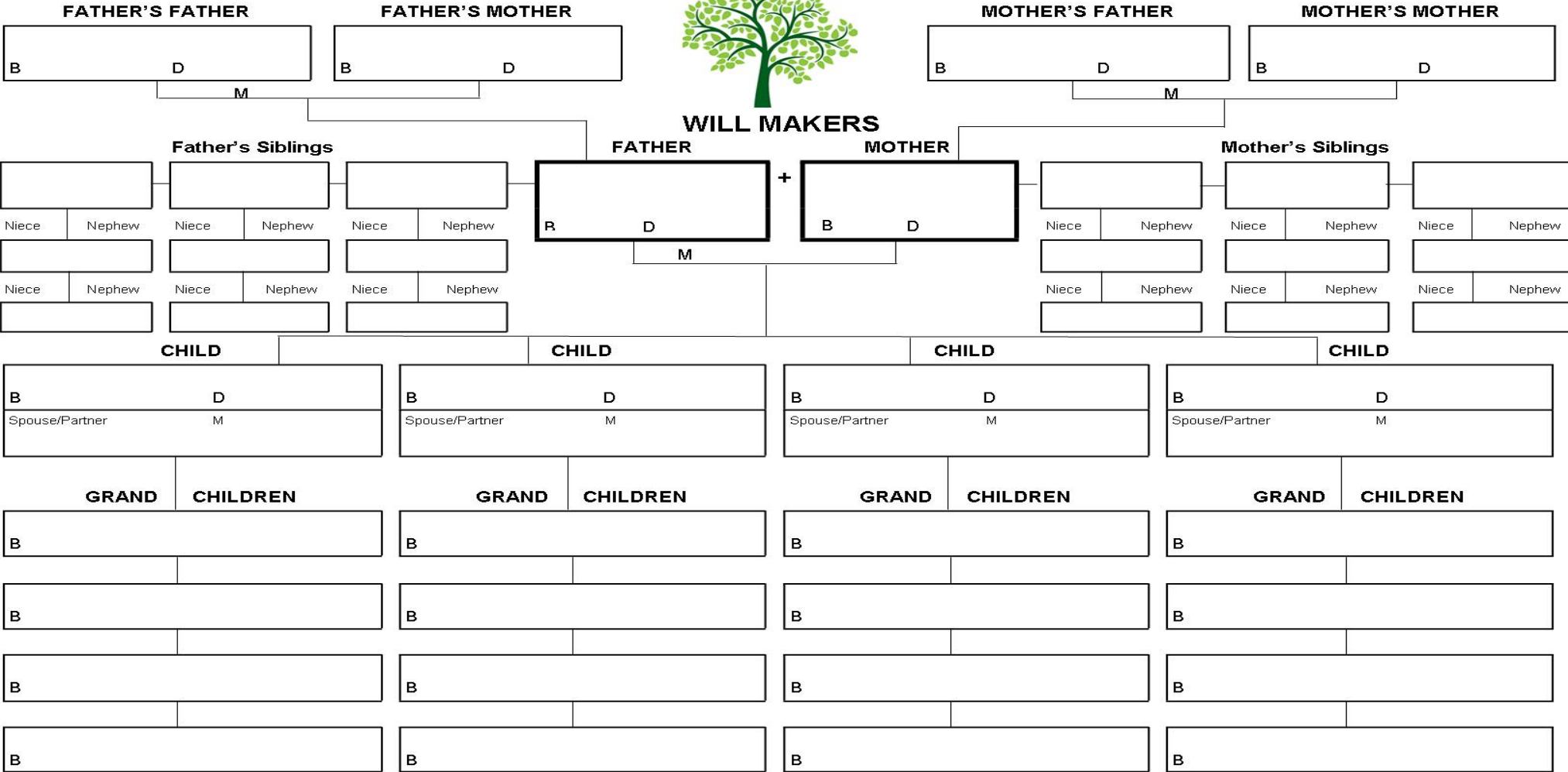
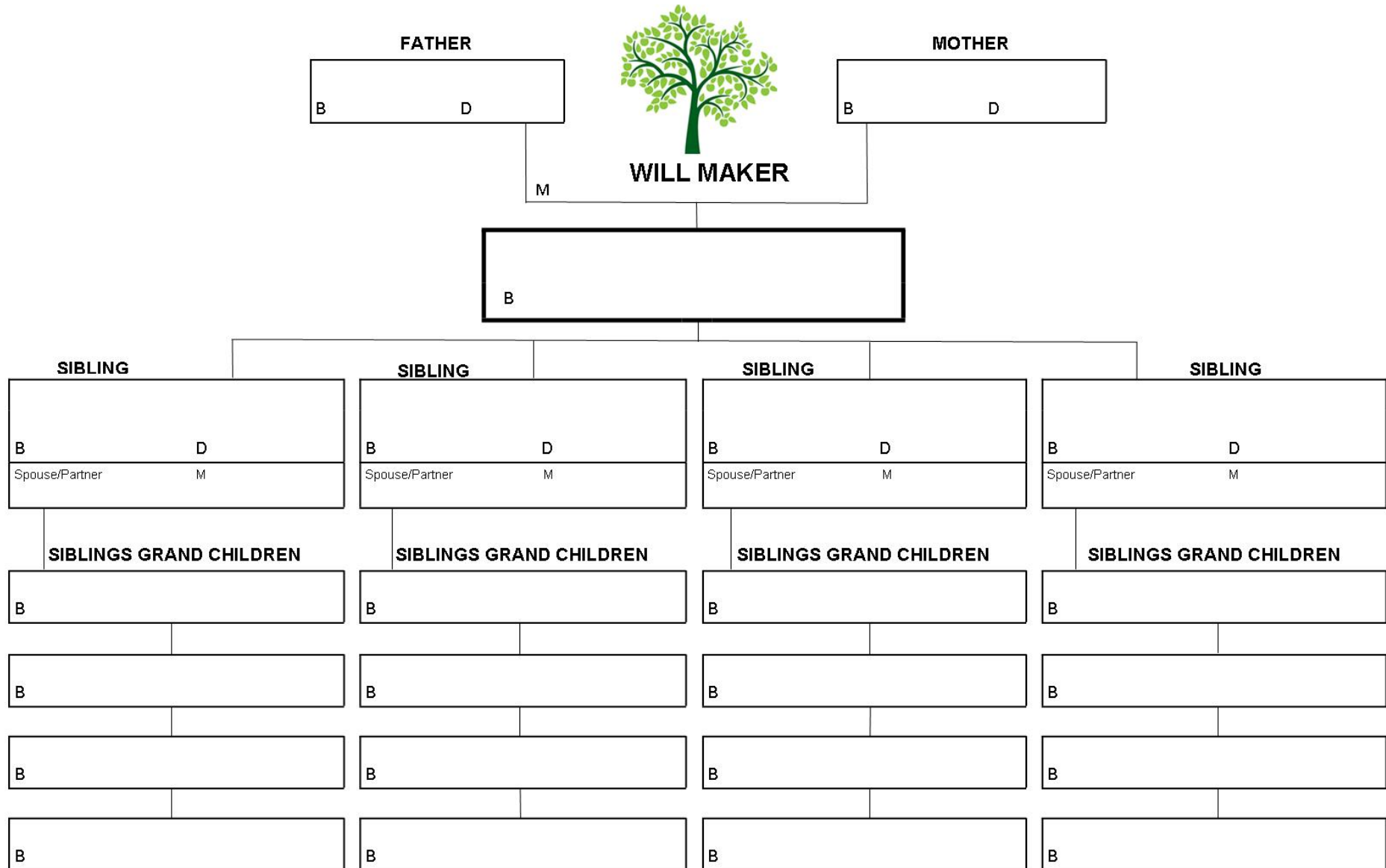
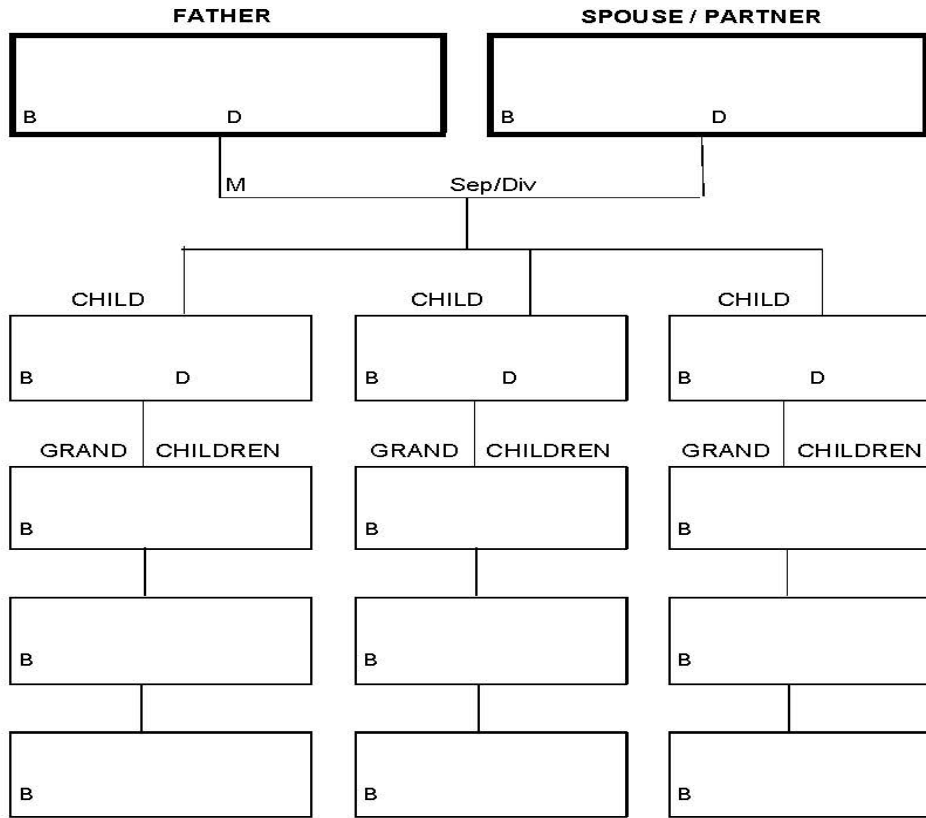


Diagram For Family Tree – Single Person, no Children – 4 Generations

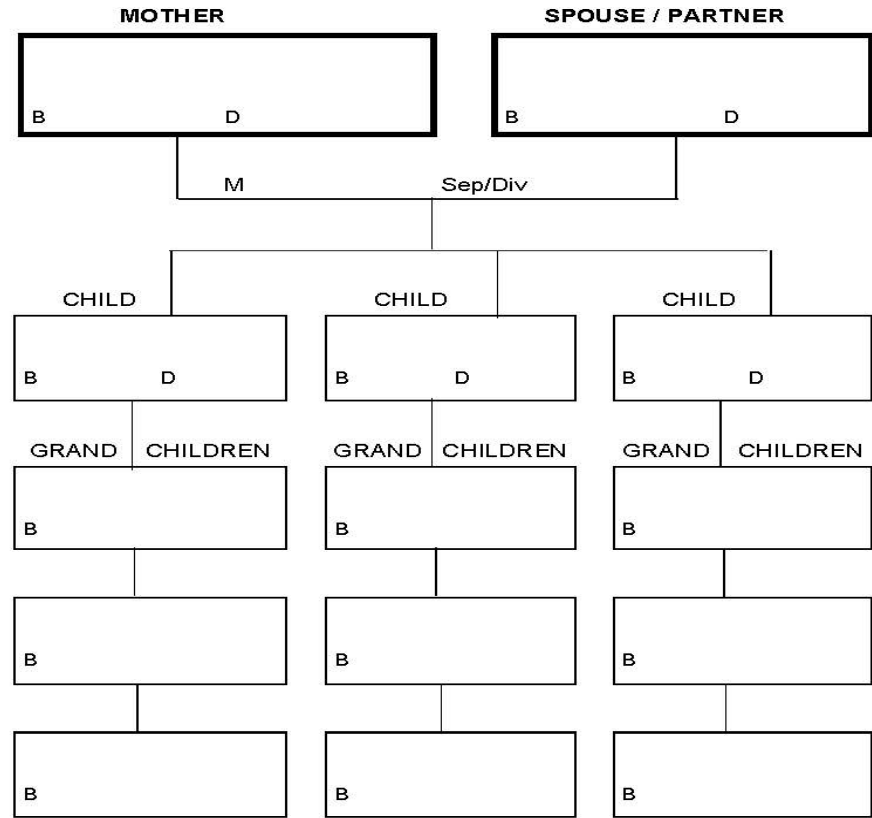


Blended Family - Children from Previous Relationships

WILL MAKER: FATHER



WILL MAKER: MOTHER



B =Date of Birth **D** = Date of Death **M** = Date of Marriage

Diagram of Private Company Structure

DIRECTORS

Position: _____	Position: _____	Position: _____	Position: _____

COMPANY NAME: _____

ABN: _____ ACN: _____ TFN: _____
 Date of Incorporation: _____ State: _____ No. Issued Shares: _____
 Registered Office Address: _____
 Accountant: _____
 Copy of Rules or Constitution or Memorandum and Articles & Director's Resolutions Available? Yes / No

SHAREHOLDERS

No. Shares: _____	No. Shares: _____	No. Shares: _____	No. Shares: _____	No. Shares: _____

Purpose of Company: Operating Company Service Company Trustee Company Trading Company

Summary of Assets/Liabilities: Are details of the Company's capital and loan accounts available? Yes No

Comments: _____

(Particularly re Succession)

Diagram for Family or Discretionary Trust Structure

Corporate Trustee

Company Name:

Directors

OR

Personal Trustee/s

Trust Name:	
Appointor:	Type: <input type="checkbox"/> Discretionary <input type="checkbox"/> Fixed <input type="checkbox"/> Unit <input type="checkbox"/> Lineal Descendant
Date Trust Established:	TFN:
Accountant:	
Copy of Trust Deed + Trustee Resolutions Available?	Yes / No

Primary Beneficiary/ies

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General Beneficiaries / Secondary Beneficiary/ies

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Tertiary Beneficiary/ies

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Purpose of Trust: _____

Summary of Assets: _____

Comments:
(Particularly re Succession) _____

Supply additional information over page or separately, if space insufficient.

Diagram for Self Managed Super Fund (SMSF)

SMSF Corporate Trustee

OR

Personal Trustee(s)

Company Name:

Directors

SMSF Name:

Date SMSF Established: _____ TFN: _____

Accountant: _____

Copy of Company Rules + SMSF Trust Deed + Trustee Resolutions Available? Yes / No

	MEMBERS	Accum'n or Pension?	B D B N*	BDBN Details
1.		A / P	Yes/No	
2.		A / P	Yes/No	
3.		A / P	Yes/No	
4.		A / P	Yes/No	

Value of Member Benefits:	Member 1	
	Member 2	
	Member 3	
	Member 4	

Comments:

Supply additional information over page or separately, if space insufficient.

* BDBN = Binding Death Benefit Nomination