

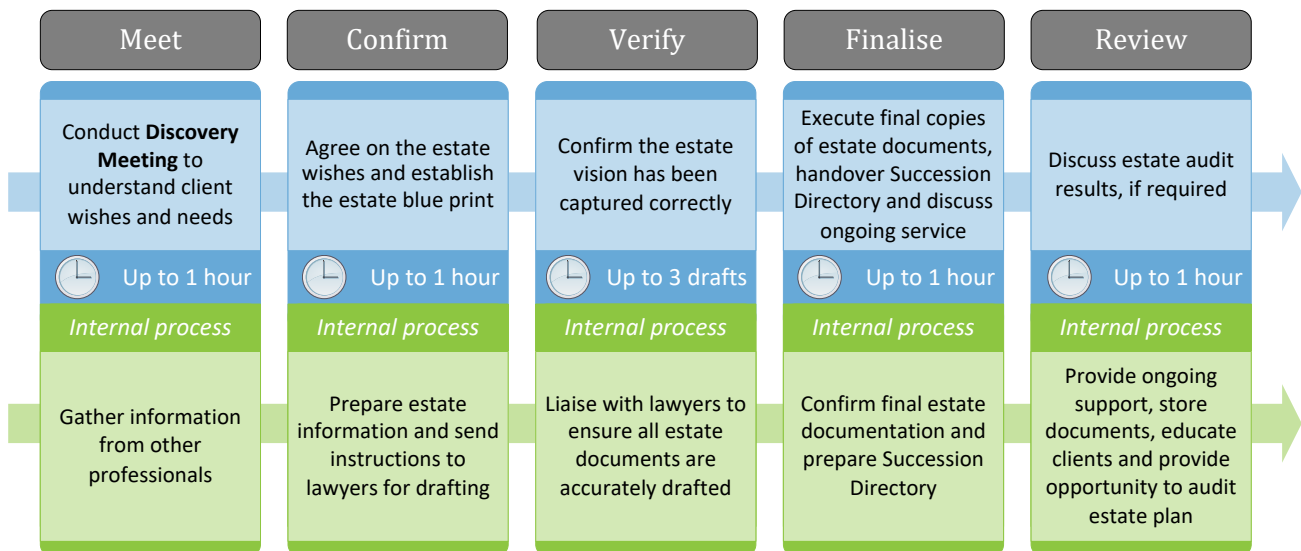
Nulsen Disability Services Estate Planning



Nulsen Disability Services has partnered with Succession Matters to provide families with Estate Planning solutions.

At Succession Matters, Estate Planning is all about understanding and implementing what is most important to you, in particular, planning for the special needs of a family member with a disability.

Through our unique Discovery meeting and working collaboratively with other professionals, we help establish your Estate Vision and develop a plan of action to resolve all of your estate needs.



Our minimum fees to resolve all your estate needs include up to 6 hours of meetings with you and are detailed overleaf. We will provide you with a fixed fee package after our Discovery Meeting with a price that reflects your circumstances.

Estate Planning - packages



We have designed our Estate Planning to ensure we fully understand your wishes and collect all relevant information. Once we have captured your estate vision we will instruct the lawyers on your behalf.

We allow up to three months to facilitate your estate needs.

Initial Estate Service

Packages*

	Foundation	Core	Complex
Wills	✓	✓	✓
Testamentary Trusts	Single	Multiple	Multiple
Special Disability Trust	x	✓	✓
Power of Attorney and Guardianship	✓	✓	✓
Advanced Health Directives	x	✓	✓
Letter of wishes (DIY template provided)	✓	✓	x
Letter of Wishes (construction)	x	x	✓
Beneficiary nominations (up to 2 super funds)	✓	✓	✓
Succession Directory	✓	✓	✓
Succession Safe (lifetime storage)	✓	✓	✓
Number of entities (i.e. trust, self-managed super)	Up to 2	Up to 4	Up to 8
Annual Estate Review	✓	✓	✓

**Fixed price package confirmed at Discovery Meeting*