



## Is a Testamentary Discretionary Trust Right for Your Will?

Use this simple checklist to help assess whether a testamentary discretionary trust might suit your estate planning needs.

### Checklist

- ☐ Do you want flexibility in how and when your estate is distributed after your death?
- ☐ Are you concerned about preserving wealth across multiple generations
- ☐ Do you have a significant estate, including property, business interests or investments?
- ☐ Do you want to protect your beneficiaries from relationship breakdowns or potential bankruptcy?
- ☐ Do you want your children or grandchildren (especially minors) to benefit from income tax savings?
- ☐ Do you have a blended family or children from previous relationships?
- ☐ Do any of your beneficiaries have vulnerabilities such as financial dependency, addiction, or disability?
- ☐ Do you want to protect the family home or key assets from being exposed to risk?
- ☐ Do you want to give your beneficiaries the option to take their inheritance via a trust or in their own name?
- ☐ Have you received advice that your superannuation or life insurance should pass through your Will?

**If you've ticked several of the boxes above, a testamentary discretionary trust may be worth considering.**

**To discuss whether it suits your circumstances, contact our team for tailored advice.**

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