SAMPLE PLAN · A FICTIONAL EXAMPLE · PERSONAL AND FAMILY

Your plan, at week 4.

The Whitlock family · Graham, 61, is a specialist stepping back from his practice. Helen, 59. Three adult children. Graham's mother needs more care.

PREPARED	WE ACT FOR	YOUR CONTACTS
End of week 4	Graham and Helen, together	Teagan Pope, weekly · Shaun O'Keefe, weeks 4, 10 and 12

01 WHAT'S HAPPENING

Graham plans to step back over the next five years. The practice sale has its own plan. At home, the wills, super, family trust and the rooms the super fund owns were set up years apart, and nobody has checked them against each other. Helen says she wouldn't know where to start if something happened to Graham.

02 THE ORDER WE'VE AGREED

	STEP	WHO	WHEN	STATUS
1	Every will, power of attorney, trust deed and policy onto one list	Graham · Helen · Us	Weeks 1 to 3	DONE
2	Check them side by side	Lawyer · Accountant · Adviser	Weeks 3 to 5	UNDERWAY
3	Confirm who steps in on the trust and super fund	Accountant · Lawyer	Week 6	TO COME
4	Agree what changes	Graham · Helen	Week 7	YOU DECIDE
5	Update wills, powers of attorney and super nominations	Lawyer · Adviser	Weeks 8 to 10	TO COME
6	Line up retirement timing with the practice sale dates	Adviser · Accountant	Weeks 8 to 10	TO COME
7	Check cover, now the practice is changing	Insurance adviser	Week 10	TO COME
8	One current list Helen can find, and the week 12 review	Us · Graham · Helen	Week 12	TO COME

03 SIDE BY SIDE: WHAT WE'VE FOUND SO FAR

ITEM	WHAT WE FOUND	WHO CHECKS IT
Wills	Seven years old, written before the super fund bought the rooms	Lawyer
Super nominations	Not updated since Graham's father died	Adviser
Family trust	Graham is the only person who controls it	Accountant · Lawyer
Insurance	Set when the practice was half its size	Insurance adviser
Rooms owned by the super fund	The lease ends during the practice sale	Already in the practice plan

04 DECIDED SO FAR

- **Week 1.** We act for Graham and Helen together. Either can speak to their professionals alone.
- **Week 2.** Helen keeps the master list. A copy sits with the lawyer.
- **Week 4.** Nothing changes until the lawyer, accountant and adviser have seen the full picture.

05 WAITING ON WHOM, THIS WEEK

- **Lawyer:** locate the original wills and powers of attorney.
- **Adviser:** copies of the super nominations.
- **Graham:** confirm who holds his mother's power of attorney.

06 ON THE LIST, NOT STARTED

- **A daughter's house deposit:** after step 4, with the accountant and adviser.
- **Graham's mother's care:** flagged to the lawyer.

A fictional example. Names and details are made up. Your professionals give the advice. This plan sets out the order and who does what.