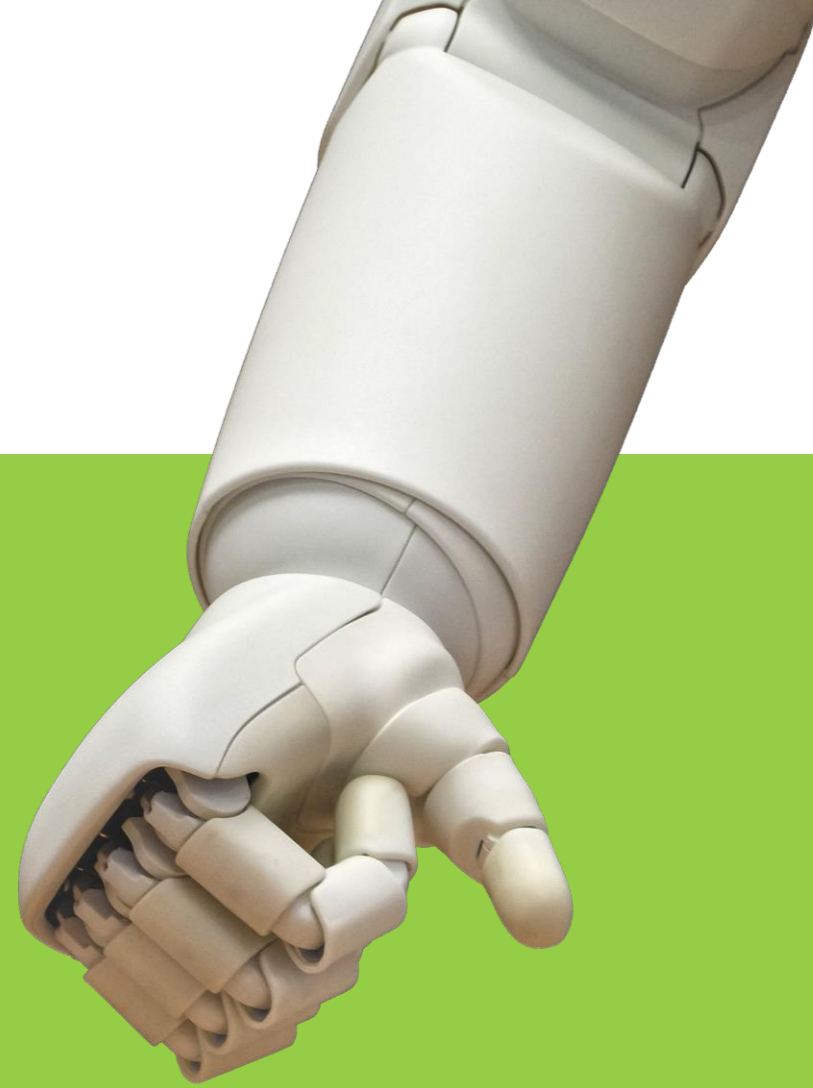


# It's not just about Advance Health Care Directives

This webinar will commence at 11am AEST. Please use the chat feature to ask any questions throughout the webinar.



24 September 2020

# Australia needs you help



Justice Jeremy Curthoys, who was scathing of lawyers' "indefensible" legal fees. Credit: WA News

Perth

## Legal fee scandal: Lawyers 'feast' on Perth family estate

The COVID19 attack on our society and economic, personal and financial freedoms has brought health, estate and life planning into sharp focus. How many Australians do not even have an enduring power of attorney, advance health care directive or a Will? And how many have a Will constructed by a lawyer many years ago that is not specific enough or really is not up to scratch in terms of trustee companies, shareholdings and protection from family provisions claims?

It is time to step up and with the LightYear Docs and Abbott & Mourly Lawyers solution you can control the process, build great Wills, Advance Care Directives and EPOAs in a single client meeting without breaching any legal professions laws, charge premium fees and look after a client's family.

# The Issues

- Starting to hit home for me personally
- Advance Care Directives are a lot harder than I planned and imagined so we will be rolling them out over the next two weeks. Victoria and NSW are very close then WA, ACT, NT and Tasmania
- Strongly advise that you complete for yourself and your family and work through the whole form
- Cannot be done in isolation. Most AHCDs require a separate form which we are incorporating as a medical decision maker unlike South Australia. Queensland is different in itself
- Suggest that we do the client's will and EPOA first then the AHCD
- Key requirements from a legal perspective – Tony Anamourlis from Abbott & Mourly

# ESTATE PLANNING ROADMAP FOR ADVISORS



## 01 Preparation of Data Capture Sheet

Advisor collects the information from the client and then inputs that information via the LY Estate Planning platform. Cost agreements prepared any other ancillary documents

## 02 LY Generates the Estate Planning Documents

LY system produces the Will, EPOA & any other Estate Planning Documents as required by the client



## 04 Zoom with Advisor & Client (45-60Mins)

Advisor arranges a Zoom Conference with the client to obtain any final instructions relating to any amendments to the documents.



## 03

Estate Planning Documents Reviewed by Abbott Mourly.



## 05 AM finalizes the documents

AM finalizes the documents and documents are sent back to Advisor & client. Another Zoom is then arranged for signing and Witnessing

# What's Coming Up

We will send you the link so make sure that you get along to this ground breaking workshop that will change the way you think.

## SUCCESSION, ASSET PROTECTION AND ESTATE PLANNING WORKSHOP

14 OCTOBER 9AM - 1PM







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