

You Did It.

Take a moment to appreciate what you've just done.

You've documented your whole life, your assets, debts, wishes and stories, in one place where the people you love can find it. Most people never do this. They mean to, they plan to, they tell themselves they'll get to it one day. But they don't. You did.

What you're holding isn't just account numbers and policy details. It's an act of love, the difference between your family spending months in confusion and knowing exactly what to do, between arguing over what you would have wanted and reading your wishes in your own words.

Your executor won't have to play detective. Your family won't have to guess. Your stories won't be lost. You've given them clarity, time, and peace.

Now do three things:

1. Tell someone where this book is.

Your executor, your spouse, one trusted person. If nobody knows it exists, everything here is wasted.

2. Set your annual review date.

Pick a day, your birthday or New Year's, and update it once a year so it stays current.

3. Have the conversation.

Tell your family this book exists, where to find it, and what's in it. Then close this book, put it somewhere safe, and go spend time with the people you love. They're the reason you did this, and one day they'll be grateful you did.

A Note From Us

Thank you for trusting The Estate Organiser Australia to guide you through this. We built this book because every Australian family deserves clarity, and you've just given yours exactly that.

If it helped you, we'd love your help spreading the word:

- **Tell a friend or family member.**

Sometimes one person saying 'I just did this and it wasn't as hard as I thought' is all it takes to start someone else.

- **Gift a copy.**

For a parent, sibling or adult child who's been putting it off. Visit theestateorganiser.com.au.

- **Leave a review.**

If you bought it online, an honest review helps other families find us.

- **Share on social media.**

Tag us @theestateorganiser on Instagram or Facebook.

- **Join our community.**

Search 'Estate Planning for Australian Families' on Facebook.

Thank you for being part of this. The more families who get organised, the fewer who suffer the chaos of being unprepared. You've done something remarkable, now help someone else do the same.

The Estate Organiser Australia . theestateorganiser.com.au

Important Legal Information

READ THIS CAREFULLY BEFORE USING THIS ORGANISER

This Estate Organiser is an information-gathering and record-keeping tool. It is designed to help you organise your personal, financial, and legal information in one place so your executor and loved ones can find it when they need it.

That is all it does. It does not give you legal advice. It does not give you financial advice. It does not give you tax advice. It does not replace any professional.

WHAT THIS ORGANISER IS NOT:

This organiser is NOT:

- A Will or testament
- A legally binding document of any kind
- A Power of Attorney or Enduring Power of Attorney
- An Advance Care Directive or Advance Health Directive
- A Binding Death Benefit Nomination
- A trust deed, company document, or succession plan
- A substitute for professional legal, financial, or tax advice
- Valid, binding, or enforceable in any court or jurisdiction

No section of this organiser - regardless of what you write in it - creates, amends, revokes, or replaces any legal document. Writing your wishes in this organiser does not make them legally binding. Only properly drafted and executed legal documents prepared by a qualified solicitor can do that.

WHAT YOU MUST DO:

This organiser supports your estate plan. It does not create one.

To create a valid, legally enforceable estate plan in Australia, you **MUST**:

- Engage a qualified solicitor to draft your Will (a DIY or online Will may not be valid in your state)
- Engage a solicitor to prepare Enduring Powers of Attorney (financial) and Advance Care Directives (medical)
- Complete a Binding Death Benefit Nomination through your superannuation fund (and renew it - most expire after three years)
- Consult with a licensed financial adviser (holding a current Australian Financial Services Licence) about your financial affairs, insurance, and investments
- Consult with a registered tax agent or accountant about tax matters, including capital gains tax and the tax obligations of a deceased estate
- Review your estate plan whenever your circumstances change - including marriage, divorce, separation, the birth or death of a beneficiary, a significant change in assets, or a change in the law

Do not assume that completing this organiser means your estate plan is "done." It is not done until a qualified solicitor has reviewed your legal documents and confirmed they are valid, current, and consistent with your wishes.

LIMITATIONS:

- Estate planning laws vary significantly between Australian states and territories. What is valid in New South Wales may not be valid in Queensland, Victoria, or any other jurisdiction.
- Laws change. This organiser was written based on general principles current as at February 2026. Legislation, court decisions, and regulatory requirements may have changed since then.
- Tax laws, superannuation rules, and Centrelink entitlements are complex and change frequently. Do not rely on any general information in this organiser as a substitute for specific advice from a registered tax agent, licensed financial adviser, or accountant.
- Your personal circumstances are unique. This organiser provides general information only. It cannot and does not address your specific situation, family structure, asset mix, or estate planning needs.
- Digital asset laws, cryptocurrency regulations, and online account terms of service are rapidly evolving areas. Professional advice is essential.

NO LIABILITY:

Prestige Worldwright Pty Ltd and its directors, officers, employees, contractors, agents, and representatives:

- Make no warranties or representations, express or implied, about the accuracy, completeness, currency, reliability, or suitability of any information in this organiser
- Accept no liability whatsoever for any loss, damage, cost, expense, claim, or consequence - whether direct, indirect, incidental, special, or consequential - arising from the use of, or reliance on, any information in this organiser
- Do not guarantee any particular legal, financial, tax, or personal outcome
- Are not responsible for any errors, omissions, misstatements, or changes in law
- Are not responsible for any decisions made, or actions taken or not taken, based on information in this organiser

This limitation of liability applies to the fullest extent permitted by law, including under the Australian Consumer Law (Schedule 2 of the Competition and Consumer Act 2010 (Cth)).

PROFESSIONAL ADVICE IS NOT OPTIONAL:

You must obtain independent professional advice from:

- A qualified solicitor (admitted to practice in your state or territory) for all legal matters, including your Will, Powers of Attorney, and Advance Care Directives
- A licensed financial adviser (holding a current AFSL or acting as an authorised representative) for financial matters, including insurance, investments, and superannuation
- A registered tax agent (registered with the Tax Practitioners Board) for tax matters, including your final tax return, capital gains tax, and the tax obligations of a deceased estate
- Other appropriate professionals for specialised matters - including business succession planning, trust administration, international estate matters, and self-managed superannuation funds

If you cannot afford professional advice, contact your state or territory's Legal Aid office or community legal centre. Free or low-cost legal assistance is available for eligible Australians.

USE AT YOUR OWN RISK:

By using this organiser, you acknowledge and agree that:

- You have read and understood this disclaimer in full
- You will obtain appropriate independent professional advice before making any legal, financial, or tax decisions
- You use this organiser entirely at your own risk
- You will not rely solely on this organiser for estate planning or for any legal, financial, or tax purpose
- You understand that this organiser does not create any professional-client relationship between you and Prestige Worldwright Pty Ltd
- You understand that the information in this organiser is general in nature and may not be current, complete, or applicable to your circumstances

IF IN DOUBT, ASK A PROFESSIONAL. THE COST OF GETTING PROPER ADVICE IS ALWAYS LESS THAN THE COST OF GETTING IT WRONG.

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FOR PROFESSIONAL ADVICE: (Not an exhaustive list - please do your own research)

- Law Council of Australia - <https://www.lawcouncil.asn.au>
- Law Society of New South Wales - <https://www.lawsociety.com.au>
- Law Institute of Victoria - <https://www.liv.asn.au>
- Queensland Law Society - <https://www.qls.com.au>
- Law Society of Western Australia - <https://www.lawsocietywa.asn.au>
- Law Society of South Australia - <https://www.lawsocietysa.asn.au>
- Law Society of Tasmania - <https://lst.org.au>
- ACT Law Society - <https://www.actlawsociety.asn.au>
- Law Society Northern Territory - <https://lawsocietynt.asn.au>

Financial and tax professionals:

- Financial Advice Association Australia - <https://www.faaa.au>

- Tax Practitioners Board - <https://www.tpb.gov.au>
- CPA Australia - <https://www.cpaaustralia.com.au>
- Chartered Accountants Australia & New Zealand - <https://www.charteredaccountantsanz.com>

Government estate resources:

- NSW Trustee & Guardian - <https://www.tag.nsw.gov.au>
- Public Trustee Queensland - <https://www.pt.qld.gov.au>
- Public Trustee Western Australia - <https://www.wa.gov.au/organisation/public-trustee>
- Public Trustee South Australia - <https://www.publictrustee.sa.gov.au>
- Public Trustee Tasmania - <https://www.publictrustee.tas.gov.au>
- ACT Public Trustee - <https://ptg.act.gov.au>
- NT Government - Wills & Estates - <https://nt.gov.au/law>
- State Trustees Victoria - <https://www.statetrustees.com.au>