

Essential Estate Planning Checklist for Queenslanders

By Bennett Carroll Solicitors

Wills + Enduring Power of Attorney (EPA)- Your quick guide to protecting your future, your assets, and your family.

✓ Do I Need a Will?

- I want to decide who inherits my assets—not leave it to default laws.
- I have children or dependents who need guardianship or financial care.
- I want to leave specific items or gifts to certain people.
- I want to choose a trustworthy executor to manage my affairs.
- I've experienced major life changes (marriage, divorce, kids, property purchase).
- I want my will reviewed every 3–5 years.

✚ Tip: Even if you already have a will, it might need updating to stay valid and effective.

✓ Do I Need an Enduring Power of Attorney (EPA)?

- I want someone I trust to manage my finances if I can't.
- I want someone to make medical or care decisions for me if I'm incapacitated.
- I understand that without an EPA, my family might need to apply to QCAT.
- I run a business or hold investments that may need active management.
- I want to avoid family conflict or confusion during a health emergency.
- I've discussed my wishes with my chosen attorney(s).

✚ Tip: An EPA kicks in if you lose capacity—it's just as important as your will.

✓ Planning Tips

- Keep originals of your will and EPA in a safe but accessible place. At Bennett Carroll Solicitors, we offer free secure storage of original estate planning documents for our clients.
- Let your executors and attorneys know where these documents are kept.
- Review your plan with a lawyer every few years or after major life events.
- Consider other documents like Advance Health Directives or Testamentary Trusts.

🛡️ Peace of mind starts here. Let our experienced Queensland estate lawyers guide you.

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