



Concepts & Results

Free Resource

Big Money Moves?

Time to Update Your Will



Make Money

Pay Less Tax

Build Wealth

Ready to Take the Next Step?

Book a meeting with us today to discuss how we can help you achieve your goals. Click below to schedule your session!

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Buying your first home, starting a business, receiving an inheritance—these are exciting financial milestones. But they also come with new responsibilities. If you’ve recently experienced a major financial or property change, it’s time to review your estate plan.

Your Will and Power of Attorney should grow with your financial life—because what you’ve worked hard to build should be protected.

1. Bought a Home or Investment Property? It Needs to Be in Your Will

Your home is likely one of your biggest assets. Without proper planning, it could become the source of confusion, delays, or even legal battles down the track.

What to do:

- Include your property in your Will
- Decide who will inherit it, or if it should be sold and the proceeds divided
- Consider how joint ownership (with a spouse or partner) affects inheritance

2. Started a Business? Plan for What Happens Next

If you own or co-own a business, ask yourself: What happens to your share if you’re no longer here? Or unable to manage it?

What to do:

- Create a business succession plan
- Update your Will to reflect business ownership and structure
- Assign Power of Attorney to someone who understands your business

3. Received a Large Inheritance or Financial Windfall? Rebalance Your Plan

Sudden wealth can change the dynamics of your estate. It may also require more strategic planning to protect it and reduce future tax implications.

What to do:

- Revisit your distribution plan—do your beneficiaries and allocations still make sense?
- Talk to a professional about tax-efficient strategies or trusts

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- Update your Will to reflect your new financial position

4. Taking on Debt? Your Estate Still Has to Cover It

If you've taken out a significant loan—whether it's for a property, business, or investment—your estate may be responsible for paying it off.

What to do:

- Make sure your Will includes instructions on how debts should be handled
- Consider how liabilities affect the inheritance your loved ones receive
- Review life insurance coverage to offset any major debts

5. Entered a Partnership? Protect Your Stake

Whether it's a business or an investment partnership, you need to clearly outline what happens to your share if you pass away.

What to do:

- Add partnership terms to your Will or separate succession plan
- Review buy-sell agreements or partnership contracts
- Ensure your family or estate won't be left in limbo

Plan Now, Protect Later

When your finances shift, your estate plan should too. A solid plan means your assets are protected, your wishes are clear, and your loved ones are taken care of—no matter what.

- ☒ Bought property?
- ☒ Started or sold a business?
- ☒ Received an inheritance?
- ☒ Entered a partnership or taken on debt?

These are all signs it's time to update your Will and Power of Attorney.

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Let's Secure Your Financial Legacy

We'll help make sure your estate plan reflects your current assets and goals, so nothing is left to chance.

Book a consultation today and take the next step toward financial peace of mind.

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