

## **FAMILY TRUSTS – THINGS TO CONSIDER**

### **FAMILY TRUSTS**

#### **Why?**

- What assets do you have?
- Are you in business?
- Do you wish to protect assets as you start a new relationship?
- Do you want to protect the assets for your partner / spouse and children in case you need rest home care later in life?

#### **How?**

- Appropriate steps and documents can protect your assets and your family.

#### **When?**

- Usually the sooner the better.
- The asset values are “locked in” at the time you do it.

#### **Cost?**

- Usually \$3000 - \$3500 for most people.

(Includes a total “package” of correct documents including:

- New Wills and Memorandum of Wishes.
- Transfer of assets to the Trust.
- New loan / mortgage documents with your Bank).

Phone or email David Brown at David J Brown and Associates for further advice with regard to any of the above.