

# **Family Trust – Why? How? When? Cost?**

## **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.