YourWillPro

Your Estate Readiness Report

Your priorities. Your next steps.

SAMPLE

PREPARED FOR

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New South Wales · 6 November 2026

Based on your answers. General information only, not legal advice.

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Your Score

41 out of 100

Significant gaps

Your path forward

1. With the 2 urgent items fixed: your score rises to about 53.
2. Then the 2 important items and 4 answers to check: about 85.
3. Then the rest of your plan: about 98.

Your answers show some arrangements in place, and some important gaps.

Your reported estate readiness

Your answers indicate that 3 important arrangements are in place. This assessment has identified 10 gaps and 6 answers to check. Your score reflects the answers you provided. We have not reviewed your documents, property ownership records or super fund nominations. The score does not confirm legal validity, guarantee an inheritance outcome or measure the likelihood of a successful claim.

How the score works: each of the 9 areas that apply to you is scored out of 100 on the checks that apply to you there. Each gap, or “not sure” answer, takes points off in proportion to how serious it is. A few serious gaps, such as having no will or no power of attorney, also hold the score down on their own. Your overall score is a weighted average of the areas, pulled towards the weakest one. No score goes above 98, because the report has not seen your documents.

This assessment is a guide only and does not constitute legal advice. Even a high score does not mean your estate plan is complete — professional review is recommended.

What this report is not

Not legal advice. It is general information based on your answers. It does not review your documents.

Not a way to sell you a lawyer. You decide what to do next, and who helps, if anyone.

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Your Gaps at a Glance

10	6	3
possible gaps	to check	in place

This report grouped 10 possible gaps and 6 uncertain answers into 5 action areas, so you start with 5, not 16. They are shown most urgent first. Each gap is explained in full on the pages that follow, and Your Priority Action Plan follows them. We identify possible gaps. We do not replace a lawyer or your own documents. Legal documents work only if they are signed and witnessed as the law requires, and the people you appoint may need to accept.

1 Appoint who can make financial, personal and health decisions for you

URGENT

If you lose capacity, the people you would want to act for you may have no authority unless you have appointed them in writing.

Lead: You, or a lawyer

Or do it online with YourWillPro EPOA: epoa.yourwillpro.com.au/epoa

Covers (2): No Enduring Power of Attorney · No Enduring Guardian appointment

2 Review provision for all your children and anyone who relies on you

URGENT

Each child's share, care and guardian needs planning, and so does anyone who relies on you.

Lead: A lawyer

Covers (2): Guardian discussed but not documented · Not sure whether your children's inheritance is protected if your partner re-partners

3 Have your will reviewed

IMPORTANT

Your answers show points in your will that need attention.

Lead: A lawyer

Or online with YourWillPro Will (coming soon)

Covers (2): Your will is more than ten years old and your life has changed since · No backup (substitute) executor named

4 Check your super, insurance, your household's access to money and other money matters

IMPORTANT

Super often does not follow your will. Life cover may not be enough, or may not be confirmed. Your household may need money while your accounts are frozen. Debts you guarantee and inheritances you expect also affect what your family receives.

Lead: A financial adviser

Covers (6): You have nominated someone for your super, but are not sure the nomination is binding · Not sure whether your super and your will together give the result you intend · Not sure whether your life cover would be enough · More than one super account · An inheritance you may receive is not yet planned for · Not sure whether your family could pay the bills while your accounts are frozen

5 Organise your essential records

NEXT

Without organised records, the people left behind may not be able to find your will, your assets or your accounts.

Lead: You

Covers (4): Your executor doesn't know where the documents are · Someone could get into only some of your devices · Your will does not mention your digital assets · Not certain anyone could find your will

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After a Death: The First 30 Days

Keep this with your will. It tells whoever is left what to do, in order, for your situation.

The first few days

- ☐ Get the doctor's medical certificate of cause of death, and call the funeral director. The official death certificate follows once the death is registered.
- ☐ Find the will. Your answers say the people closest to you may not know where it is. Your Estate Information Pack has a space to record it.
- ☐ Contact the executor you named. They have agreed to act.
- ☐ Look after your children first. Contact the person you discussed as guardian, if there is one.
- ☐ Think about who depended on the person, including children and pets.
- ☐ Secure the home and belongings: lock up, keep the keys safe, and look after any vehicles and valuables.

The first two weeks

- ☐ Order several certified copies of the death certificate. Banks, insurers and the super fund will each ask for one.
- ☐ Use the free Australian Death Notification Service at deathnotification.gov.au to tell several organisations at once, including banks, phone and utility companies that have joined. Check which are covered.
- ☐ Tell Services Australia, which covers Centrelink and Medicare, and the ATO.
- ☐ Contact the super fund(s) and ask about death benefits. Have the nomination details ready.
- ☐ Make a life insurance claim. Policies can sit inside or outside super.
- ☐ Keep the home, contents and car insurance current, and tell the insurers about the death. Some policies may not cover a home left empty for long.
- ☐ Keep records: bills, receipts, bank statements and letters, and a note of every payment made for the estate.

The first month

- ☐ Speak to a lawyer or the public trustee body in your state about probate if there are assets in the deceased's name alone. Not every estate needs it.
- ☐ Cancel or transfer subscriptions, memberships and utilities. Keep what the family still needs.
- ☐ Do not distribute anything until the debts are known, and get advice first. An executor who distributes too early may be personally liable if debts or claims appear later.
- ☐ Online accounts: your answers say someone could get into only some of the devices, so some accounts may be hard to reach. Contact each provider; many have a process for the deceased's accounts.

This is general information, not legal advice. Probate and claims time limits vary by state.

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