

Superannuation Transfer Caps Estate Planning Review – Urgency Flowchart



Do your Superannuation Accounts exceed \$1.6 m ?

[Yes]

[No]

Does the total of you and your spouse's Superannuation Accounts exceed \$1.6 m?

[Yes]

[No]

Do either you or your spouse receive a pension from super?

[Yes]

[No]

Will either you or your spouse commence A pension from Super Pre 1 July 2017

[Yes]

[No]

Seek Financial Advice and Review Estate Planning Documents ASAP. You can either:

1. Limit your estate planning advice to the super changes based on your prior Will – Use attached order form
2. Seek broader personalized estate planning advice – Make an appointment with an estate planning specialist

You should review:

- Impact of Transfer caps when you commence a pension
- Your Will and other documents regularly (but not necessarily before 30 June 2017)

(but not necessarily before 30 June 2017)
Your Will and other documents regularly