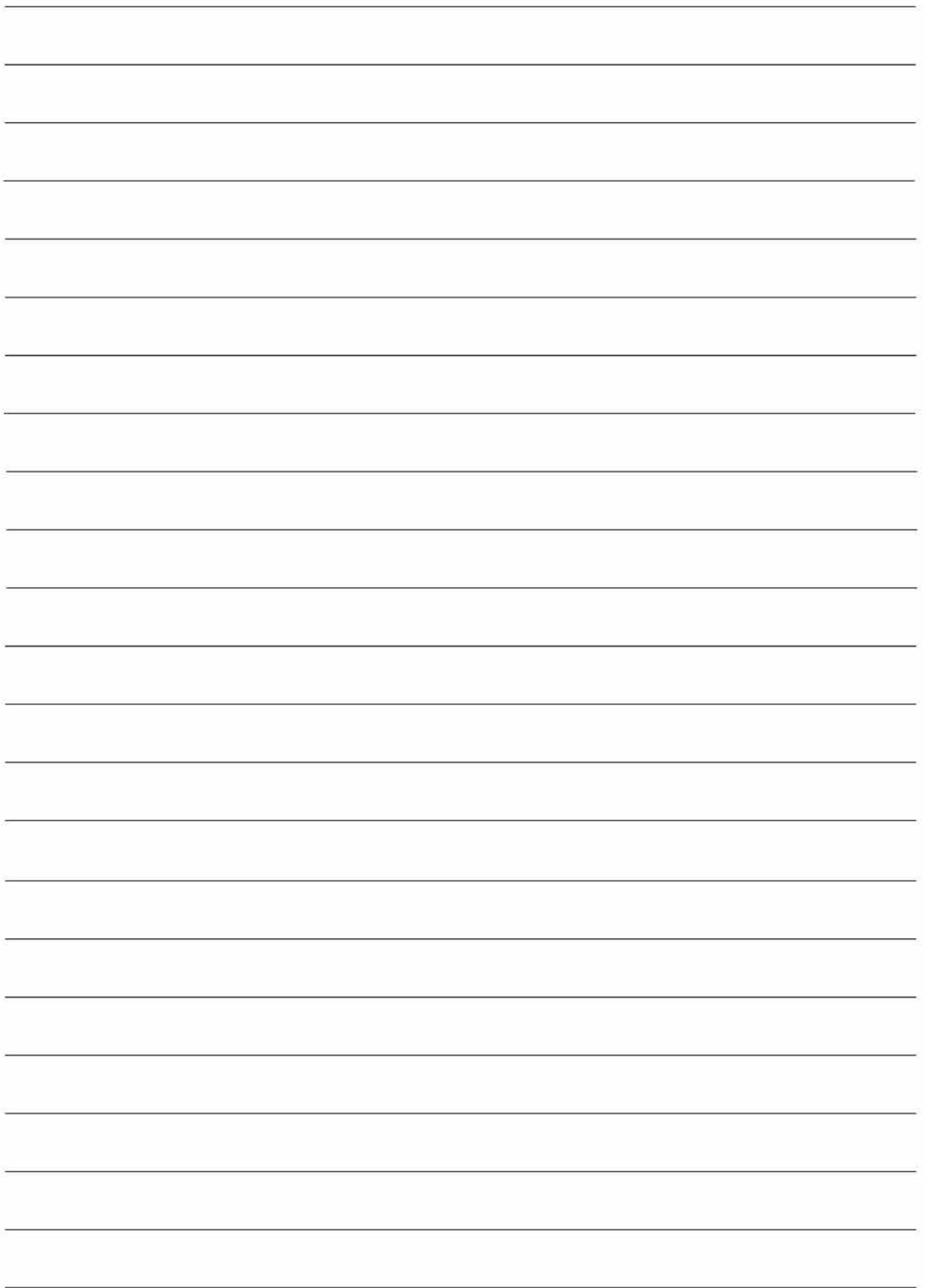


# Legal Essentials for Businesses

Phase 8: Estate Planning

# Introduction







What are the key  
in the estate plan?

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Will

Buy sell option agreement

Testamentary trust

## Power of Attorney

## Advanced Health Directive

## Self Managed Super Funds



## Estate planning for a business owner



What do they want?

What is their structure?

Do they have business partners?

What involvement will their life partner have in the business?



What insurance do they already have in place?

Do they want to exclude any children?

What happens if they don't have an estate plan?

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## NOTES

