

Benchmark Consultants is a boutique financial planning practice located in the picturesque town of Kalamunda in the Perth Hills, situated close to the Perth Airport and only 25km from the CBD.

Benchmark Consultants is owned and operated by Mr Peter Stewart* and is a Corporate Authorised Representative 289570 of RI Advice Group Pty Ltd (ABN 23 001 774 125, AFSL 238429). Benchmark Consultants is also a recognised FPA Professional Practice.

Peter Stewart* is a Certified Financial Planner® Professional and a member of the AFA (Association of Financial Advisers).

His qualifications also include: AEPS® Accredited Estate Planning Specialist, Justice of the Peace, FAFA Dip FP Dip Li, and is an Authorised Representative 263625 of the RI Advice Group.



Peter started Benchmark Consultants in 1986 (originally based in West Perth) and moved the office to Kalamunda in 1998. With close to thirty years experience in the financial planning profession, Peter's passion for helping others is the driving force behind his business and his commitment to helping his clients achieve their financial goals.



Find out more online..



Benchmark Consultants®

Achieve more with your Financial Planner

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Estate Planning

Benchmark Consultants offers the services of an AEPS® Accredited Estate Planning Strategist to help you develop a comprehensive Estate Plan

Phone 92932922
to make an appointment



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e info@benchmarkconsultants.com.au
Suite 2, Barber House, 16 Mead Street
Po Box 944, Kalamunda WA 6926

www.benchmarkconsultants.com.au

Footnote:

* Authorised Representative of
RI Advice Group Pty Ltd
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10 ESSENTIAL ESTATE PLANNING REQUIREMENTS

Basic Will

A Will specifies who inherits your assets/ possessions, who takes care of minor children and any charities you'd like to see receive donations in your honor when you pass away. It will also generally name at least one (and possibly a substitute) Executor to administer your Estate.

Beneficiary Forms

The beneficiary form you complete for your insurance policies or Superannuation accounts, generally determines who receives those particular funds when you pass away.

Guide to Digital Assets

Write down your passwords for everything from your credit card accounts, social media accounts to your e-mail. Consider using an online password storage service (then you only have one password to remember). Leave your Executor instructions on how to find your password cheat sheet.

Inventory of Assets

Make a list of your personal assets (including joint assets) to make it is easier for your Executor to track when the time comes to distribute assets.

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Funeral Arrangements

You could add a provision to your Will stating your desire to be cremated / buried and where.

Trusts - Children

If you have minor children your Will can provide provisions for monies to be held in trust until a specified age.

Trusts - Couples

Couples may want to establish a Testamentary Trust to protect money from going to creditors or a new spouse.

Trusts - Other

Other trusts to consider include: Irrevocable Life Insurance Trusts, Qualified Personal Residence Trusts, Grantor-retained Annuity Trusts and Charitable Trusts.

We can assist you with all of these Estate Planning requirements tailored specifically to your own personal family situation.

Protect your Estate by contacting Benchmark Consultants on 9293 2922 to arrange your Estate Planning appointment.

Enduring Power of Attorney - Financial (EPA)

By signing an EPA you are allowing your attorney (Donee) permission to act on your instructions (financial affairs) in the event of 1. Whilst you have capacity but are temporarily unable; and/or 2. If you subsequently loss of capacity in the future.

Enduring Power of Guardianship - Health Care (EPG)

With an EPG you authorise someone (your Agent) to make medical decisions for you if you are unable.

Living Will

In a Living Will, also known as an Advanced Health Directive (AHD), you spell out your end of life wishes about prolonging medical care.

List of Contacts

Make a list of personal advisors including; lawyers, bankers, tax advisors etc. If you own a home, make a list of utility and service providers.

For more information

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This brochure does not consider your personal circumstances and is general information only. You should not act on any recommendation without considering your personal circumstances and objectives.

Benchmark Consultants recommend you obtain professional financial advice specific to your circumstances.