



7. MAKE GIFTS

FOR A GREAT RETIREMENT *Lifestyle*

- 1 Create ideal gifting plan
- 2 Consider Plan B & C in the event your beneficiaries pass away before you
- 3 Consider risks such as legal action against the estate or beneficiaries
- 4 Consider tax for your beneficiaries including the 'death tax' for adult children
- 5 Complete a superannuation beneficiary form
- 6 Consider gifting specific assets, versus dividing total pool of assets
- 7 Consider who can act on your financial and medical decisions, if overseas or unwell.



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