

Personal Legal Health Checklist

For us at QHL being your 21st century lawyer means doing all we can to ensure your legal issues are sorted before it's too late. This simple tick box checklist is designed to help you identify where you are doing well and where you might need some attention from a legal perspective.

Thinking outside the box we have also included some general questions as well. If you answer "no" to any of the questions below, please give us a call and we can help.

The team at QHL

Do I have:

A Will?

Are the trustees/guardians still the right people?

Should I change who receives what?

Have I covered burial/cremation/where?

Are my children adults now?

Have I forgiven all the debts I need to?

Do I deal with my family trust in my will?

| Yes | No | N/A |
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Enduring Powers of Attorney?

Are the attorneys still appropriate?

Should I have alternative attorneys?

Do I have both types – property and personal care?

Who knows that I have one?

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My Assets protected?

Do I need a trust?

Are the trustees still appropriate?

Can I put more into the trust?

Do I have regular trust minutes/records?

Are my assets adequately insured?

Am I adequately insured?

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My liabilities minimised?

- Loans and mortgages being paid fast enough?
- If nothing's owing, is the mortgage taken off my land title?
- Regularly review and if possible release all personal guarantees?
- Considered debt consolidation?
- A personal budget?

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Employment issues covered?

- A current Employment Agreement?
- Current role description?
- Regular reviews with my employer?

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My Business sorted?

- Have I completed the QHL Business Legal Health Checklist?

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If you have completed your checklist online, let us know your contact details below and press **SEND** and one of our team will be in touch to talk through your questions with you.

Contact Details:

Name:

Email:

Phone: