



# Gallie Miles

— LAWYERS —

## Legal Housekeeping Checklist

Is your legal housekeeping up to date? Use this simple checklist to make sure you're up to date. Please get in touch if you need assistance completing any of the below.



### WILL & ENDURING POWERS OF ATTORNEY

I have a Will

I have reviewed my Will in the last 5 years

I have updated my Will because:

I am in a new relationship

I now have children who will need guardians upon my death

I have separated from my partner or spouse

Other reason.

I have Enduring Powers of Attorney for property and personal care

I have appointed successor/"back-up" Attorneys



### TRUST

I have updated my Trust Deed in accordance with the Trusts Act 2019

I have had an annual trustee meeting in the last 12 months

I understand my legal obligations under the Trusts Act 2019



### RELATIONSHIP PROPERTY

I have protected my assets from relationship property claims by entering into a Contracting Out Agreement

I have reviewed my Contracting Out Agreement in light of the following:

Inheritance I have received since signing

New home which I have purchased

Change in my circumstances. For example, marriage or children

I have legally divorced from my partner after my separation

I have legally separated my assets from my partner to avoid future claims against my property

or email to [office@gallie.co.nz](mailto:office@gallie.co.nz)

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