

Estate planning redefined

Do the right thing by your loved ones.

50% of Australians don't have a will. Use the wealth portal's estate planning features to get your affairs in order. Get a new will or if you already have one, upload it to the wealth portal alongside the other important documents your executor and heirs might need.



Ultimate peace of mind

Your wealth portal's myprotection area helps you keep all your important documents organised. Upload your will, insurances, and instructions so your loved ones know exactly where to find them.



Get a will from the experts

Don't have a will? The Will Wizard asks a series of simple questions to assess your estate planning needs. If appropriate, it'll generate a will for you and your spouse from a template provided by specialist law firm, View Legal.



Create an Executor Kit

Don't leave your loved ones in the lurch. Upload your signed will to the wealth portal and create an Executor Kit - a summary document outlining your wishes and estate - so your executor has everything they need.



The right will at the right time

Should you have more complex estate planning wishes - overseas beneficiaries, a family trust, etc. - the Will Wizard will notify your adviser so they can introduce you to a specialist law firm.

