

# THE MONTHLY GRIND

A Regular Publication by Wollerman Shacklock  
Lawyers



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## MEET JESS POWELL

Legal Executive at Wollerman Shacklock  
Lawyers

Jessica is one of our Legal Executives. She is a very bright and enthusiastic member of Wollerman Shacklock Lawyers and has been a part of the team for 10 years. Jess has the ability to make dealing with estate a much less stressful process when clients are going through a difficult time. Jess values the smaller size of the firm which really enables her to learn about her clients which effectively helps out Jess and Clients achieve an outcome. Jess loves the friendliness of the staff again appreciating the smaller size of the firm, as all team members develop friendships so all of the Wollerman Shacklock team can work together.



## What is a Grant of Representation?

A Grant of Representation is a document issued by the Supreme Court of Victoria which enables those named as Executors or Administrators to deal with the assets of the deceased.

The Grant provides official proof that the person named in the deceased's Will is entitled to handle the estate of the deceased. Here are some types of Grants of Representation that may be issued by the Court:

**Probate**– Probate is granted where the deceased's last Will is proved by one or more Executors named in the Will;

**Letters of Administration with the Will annexed**– is granted where the deceased has left a valid Will but the named Executor cannot or will not apply for a Grant.

**Letters of Administration**– where a person dies without a valid Will the Court issues a Grant of Letters of Administration, usually to the next of kin of the deceased.

Estate Administration can be a long and drawn out task, depending on the circumstances, and it is essential that the right advice is sought from a skilled legal professional.

Please note that this Office will be closed from 5.00 pm Friday, 20th of December 2019 and will re-open at 9:00am on Monday, 6th of January 2020.

From all of us at Wollerman Shacklock Lawyers, we wish your family and your staff a very Merry Christmas and a Happy New Year.



## Who is Formation FS?

Founded by Michael Anderson in 2009, Formation Financial Services is a Melbourne-based financial planning business that combines exceptional service with the warmth and flexibility of a small business environment.

Michael has been working in the financial services industry for over 20 years and has been operating Formation Financial Services for ten years, since it was established.

Serving as the Practice Principal, Michael helps his clients to find security and peace of mind by guiding them through the financial advice process, while providing ongoing education and updates on their strategic plans. He will make your financial plan your own and purpose-built to assist you in reaching both your financial and lifestyle goals.

Amid the ever increasing cost of living, Formation Financial Services provides simple and adoptable financial advice to individuals, couples and business owners throughout all stages of life. They believe that financial planning shouldn't be unnecessarily complex, and with the right support, anyone can become empowered to overcome financial challenges, invest wiser, and meet their financial goals faster.

Their services include:

- Investment advice
- Superannuation
- Retirement planning
- Life insurance and income protection
- Budgeting, saving and debt management
- Estate planning
- Centrelink benefits
- Business succession planning



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