

Why is estate planning important?

Because it ensures ...

...the appropriate assets are

...with the appropriate people

...at the appropriate time

e.g. will there be enough assets to pay off your debts and care for your family?

e.g. will unnecessary tax be paid? Are you sure your assets will end up with the right people? e.g. could your children receive their inheritance before they are mature enough to cope?

estate planning is for anyone:

- (a) with or in control of assets;
- (b) with family; or
- (c) in business.

How does the facilitation process work?

As facilitators we will work closely with your team of advisers (accountants, lawyers etc) to coordinate an estate plan specifically tailored to your needs. Our unique process allows us to coordinate funding and legal solutions in a timely and cost effective way.



What is our estate planning process?

First meeting

Our process will minimise your time

Explain	Discover	Identify	Present	Implement	Explain
and	and	and	and	and	and
Educate	Accumulate	Clarify	Prepare	Initiate	Educate
As facilitators we invest the time to make sure you understand the key issues and why they are important.	Our unique audit process allows us to obtain the information required in a timely manner.	Using our discovery checklist we will quickly identify and clarify what needs to be done.	We will present you with an easy to understand report on the issues identified along with a plan of action including all costs.	As facilitators we will coordinate the implementation of your plan and initiate what needs to be done with the relevant professionals.	Once your plan is in place we will review it with you to make sure it meets your objectives.

We will also review your plan on a regular basis to ensure it continues to meet your needs