

Why is estate planning important?

Because it ensures ...

...the appropriate assets are

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

...with the appropriate people

e.g. will unnecessary tax be paid? Are you sure your assets will end up with the right people?

...at the appropriate time

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

