Educators in personal estate and business succession planning

real services
facilitators + educators

Why get real?

Professional advisers understand the importance of estate and succession planning but may need some help in educating clients on why it's important, how they go about it and what needs to be done to get their plans in place.

Real provides the why, how and what of successful estate and succession planning.

Our facilitation process ensures clients get the right advice by the right people at the right cost.

Our programs are delivered by people with real experience in estate and succession planning using a proven process with practical tools.

A succession facilitator is someone who takes the lead role and provides clients with a process that helps them identify their needs and objectives so they can make high quality decisions.

How does the real facilitation process work?

The team at real who come from a range of professional backgrounds have pioneered a 7 step process that takes the client on a journey from engagement to implementation then review. The facilitation process as illustrated below is designed for personal estate and business succession planning with specific tools and training for each step of the process.

Our process allows the facilitator to engage the client and project manage their estate and succession plan by coordinating other service providers such as lawyers, accountants and financial advisers. The facilitator may also play one of these key service roles and provide advice as part of the facilitation process and be remunerated on multiple levels.

Explain and Educate	Discover and Accumulate	Identify and Clarify	Present and Prepare	Implement and Initiate	Explain and 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 "real's education programs have helped refine my existing process and enhanced my client value proposition."

ADAM SMITH – DIRECTOR, SUCCESSION MATTERS

What are the real education programs?

real provides comprehensive education programs in personal estate planning and business succession planning to groups or individuals wanting to provide a unique service proposition for their clients. Our education programs follow the same 7 step process which allows the facilitator to easily move the client between their personal and business succession needs and below is an outline for each component of the program.

Technical component

Each program includes a technical guide covering the key aspects of personal estate and business succession planning. The technical components are delivered by our educators who have specialist knowledge as well as being experienced facilitators. This allows them to demonstrate how to use the required technical knowledge in a practical way in keeping with the facilitation role.

Practical component

This component is a major point of difference in that it provides a complete end to end process with specific tools for each step of the process. These tools include client engagement, data gathering, checklists, issues papers, action plans and client review tools. A personal estate and business succession facilitator's guide detailing each step and explaining how to use each of the tools is also provided.

Virtual coaching

Our virtual coaching programs are conducted online using web based meeting technology and recordings of each session are made available for future reference. These sessions cover a number of topics including implementation of the process, further technical and practical support and how to better engage clients and COI's. A complimentary coaching session is included with each education program.

Packaging and pricing

The value of estate and succession planning can sometimes be difficult for clients to understand. Both programs include material and training on how to package and price a facilitated personal or business succession service and how to position it with both clients and centres of influence.

Who is real?

real services was founded by a team of dedicated professionals with a clear vision of making the facilitation of personal estate and business succession planning easier and more attractive to the many advisers who want to make it part of their client value proposition. real has delivered educations programs to national advisor networks, private banks and accounting firms throughout Australia and New Zealand and brings a practical approach to adviser education.

If you want to get real about estate and succession planning contact us

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