

Facilitators in personal estate & business succession planning



Why get real?

Because your most important asset you have is you and your family. Estate and succession planning ensures the right people, end up with control of the right assets when they need it most.

Most people don't even have the basics in place like an up to date Will and Enduring Power of Attorney. We can arrange solutions simply and quickly to give you and your family peace of mind.

Because we provide a process that helps you decide what's important so we can facilitate the right people to give you the right advice at the right cost.

How does real facilitate?

Our process allows you to make high quality decisions in relation to your estate and succession plan. We use a team approach that includes accountants, lawyers and financial advisers to minimise time and costs and keep what can be complex simple. This area is too important to only get half right and we have the process, knowledge and relationships to get your plan in place.



What is the real process?

real provides a process not a product which is outlined below and the first three steps are typically covered in the first meeting at no cost or obligation which will allow you to make an informed decision about what you need to do.

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					

“Having my personal and business affairs sorted out with everything my family will need in one place gives me great peace of mind.”

DAVID WOODMAN

What is the real manager?

Do you know where all your important documents are? If the answer is no then how can you expect other people such as your executor, power of attorney and family members to know. Not only do we facilitate your estate and succession plan, but all clients receive our real manager manual.

The real manager conveniently stores and tracks all of the important information and documents relating to your estate and succession plans. This includes:



wealth manager

Your wealth management strategies and insurance policy documents including instructions on how to make a claim

documents manager

A register of your important documents and their location e.g: trust deeds, superannuation records, banking details etc

estate & succession manager

Information on your estate and succession plans and copies of the relevant documents e.g: wills, powers of attorney, business agreements etc

relationship manager

Instructions to those you have put in charge of your personal and business affairs to help them make the right decisions. Preserving relationships is as important as preserving assets.

Who is real?

real services is owned and managed by experienced professionals who have a clear focus on making estate and succession planning easier and more accessible to the overwhelming majority of people who need it. real services acts on behalf of the client and operates under a fee for facilitation arrangement. Our clients will always know who is providing what service and at what cost before proceeding and our facilitators will ensure the “right advice will be provided by the right people at the right cost”.

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



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