

ESTATE WISE

**On-line estate planning
support & advisory service**

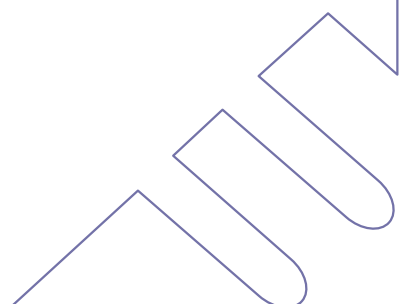


*With Estate Wise, you can convert that into a **positive** for your business.*



Every transaction your clients engage in could impact their estate planning needs.

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Enhance your future by preparing clients for theirs

www.estatewise.com.au

As you will be aware, many of the transactions your accounting or financial planning clients engage in will have an impact on their estate planning needs. You may be unsure how best to help them address those needs.

If so, you're missing a golden opportunity to not only enhance outcomes for your clients, but also:

- Add significant value to your services
- Increase revenue for your business
- Strengthen client relationships and loyalty
- Generate new business opportunities through closer involvement in your clients' affairs
- Reduce the risk of being held responsible for not giving the right advice
- Increase your knowledge base by working more closely with other professionals.

- The ability to quickly and easily create updated or new types of documents in the future
- Direct consultancy with other highly experienced estate planning professionals
- On-line access to estate planning documents by your clients and their selected family members, executors, beneficiaries or advisers
- Periodic receipt of important estate planning information and reminders to review documents
- The organisation and management of estate-planning seminars and information sessions.

REVENUE FOR YOU

The fees payable by your clients for estate planning services and documentation that involves Estate Wise and Donaldson Walsh can be shared between Estate Wise, Donaldson Walsh and you.

The details in this regard would of course be negotiated with you at the outset to the satisfaction of all parties.

DOCUMENTS ON DEMAND

A rapid turnaround is available on the following draft documents:

- Testamentary Trust Wills
- Simple Wills
- Powers of Attorney
- Powers of Guardianship
- Medical Powers of Attorney
- Anticipatory Directions
- Death Benefit Directions
- Estate Planning Reports.

Simply enter and submit your client's relevant data on-line. Estate Wise will then forward your draft estate planning documents to you and your client within hours. Then it is simply a matter of arranging an appointment with Donaldson Walsh Lawyers for legal approval and execution of the documents.

ESTATE WISE PUTS ALL THESE OPPORTUNITIES WITHIN EASY REACH

Estate Wise is an internet-based estate planning support and advisory service that allows you, within your own office structure and environment, to meet your clients' estate planning needs.

Here's what the Estate Wise process makes possible:

- Quick and easy access to important estate planning information
- Rapid completion of your clients' draft estate planning documentation
- The security of arranging a lawyer to advise your clients to ensure that clients' documentation properly effects their wishes and is properly executed
- The updating of clients' personal data at any time

HOW DOES THE PROCESS WORK?

Pretty much however you'd like it to.

Estate Wise and Donaldson Walsh Lawyers will sit down with you to customise the Estate Wise system to suit your practice.

We will augment the estate planning advice and service you already provide, rather than duplicate it, effectively acting as facilitators and project managers.

Alternatively, we can provide a complete service solution to your clients' estate planning needs if required.

We'll ensure that you're able to provide your clients with estate planning services promptly, professionally and with legal certainty.




To learn more, visit www.estatewise.com.au or speak to a member of the Donaldson Walsh Wills, Estates & Business Succession team on (08) 8410 2555.

(l to r) The DW Wills, Estates & Business Succession team
Tim Duval, Kieren Moore, Sandy Donaldson, Rod Dunne, Christopher Bruce and Madeleine Crawford with Jeremy Duffy of Estate Wise

STRAIGHT TALK.

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