

# WHY IS ASSET PROTECTION & ESTATE PLANNING IMPORTANT?

Asset Protection and Estate Planning ensures that ...



*The key to good protection is the right amount of money, for the right person, at the right time.*

## How does the facilitation process work?

As facilitators we will work closely with your team of advisers (accountants, lawyers etc) to coordinate an asset protection and estate plan specifically tailored to your family. Our unique process allows us to coordinate funding and legal solutions in a timely and cost effective way that ensures you can focus on what you do best.



## What is the asset protection and estate planning process?



*We will also review your plan on a regular basis to ensure it continues to meet the needs of your family.*

## Keeping You Organised

With your Asset Protection and Estate Planning objectives addressed, being well organised equates to much better decision making and protection against uncertainty. Should disaster strike or should your circumstances change are you ready? What arrangements do you have in place to make sure all your precious memories and documents would survive?

Our clients typically have complex affairs, with super funds, businesses, family trusts and other interests that their spouse is quite often not familiar with. In the event of that person's death, the surviving spouse is generally left to try and piece together the financial affairs of their deceased spouse. This can lead to delays in processing the estate, assets and liabilities being overlooked, insurance policies being missed and an overall position of feeling lost and overwhelmed.

We recommend you consider our *Get Me Organised & Keep Me Organised Service* to make sure this never happens. This service acts like a sophisticated letter of instruction to ensure the adequate preparation has been made. Please refer to our *Get Me Organised & Keep Me Organised Flyer* for more information or please contact us to discuss how this service can specifically benefit you.

## The Next Step

Contact us to design an indicative estate plan for you and your family.

## Contact Us

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