

WHY IS BUSINESS PROTECTION & SUCCESSION PLANNING IMPORTANT?

Business Protection and Succession Planning ensure 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 a business protection and succession plan specifically tailored to your business. 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—running your business.



What is the business protection and succession planning process?



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

ADVICE PACKAGES—Complex

Business Succession Essentials: \$5,500 (including GST)

For Clients requiring bespoke Business Succession Advice.

- “Life Risk Only” package included
- Business Insurance Trust Agreement including Provisions for Death, Disability, Trauma, Resignation and Retirement
- Shareholder/Proprietors Agreement (extra \$2,970)

Please Note:

- Personal Risk Professionals engage Specialist Estate Planning and Business Succession Lawyers to provide the Legal Advice and Drafting of the above Estate Planning and Business Succession Documents.
- All Estate Planning Package prices noted are subject to change if any variations are required to the Standard Package. Work will not commence until authorisation has been provided by the client to proceed with the variations.

The Next Step

Contact us to design an indicative succession plan for you and your business.

Contact Us

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