

## Why is estate and succession planning so important?

Because the most important assets you have are you and your family. Estate planning ensures the right people end up with the right assets at the right time.

Because most people don't even have the basics in place like an up-to-date Will and Enduring Power of Attorney, or know where important documents are located.

Because more estates are being challenged and protecting your family's relationships provides peace of mind knowing your assets will end up in the right hands.

## How can our Legal Concierge help?

Our Legal Concierge service supports you and your adviser in facilitating your estate plan with our member law firms and is complimentary.

On the request of your adviser we will contact you and explain what information we will require to arrange a no cost recommendation and quote from our lawyers.

We will answer any questions, confirm and clarify any information required so our member firms can complete your estate plan and provide you peace of mind.

## What are the 5 steps to your estate plan?



### Adviser + Client

Your adviser completes Scope and Quote request

Information sent via our secured website

Documents can be attached for review ie. existing wills.



### Scope + Quote

Information sent to member firm for review

Scope and Quote provided within 72 hrs

You can make informed decisions at no cost



### Confirm + Accept

Adviser confirms with you and accepts S & Q

TLH coordinates engagement of lawyer

Documents emailed for review and advice



### Advice + Documents

TLH coordinates advice meeting with your adviser

Final documents sent after advice meeting

Virtual meeting or face to face



### Finalise + Payment

Final documents sent with invoice for payment

Signed documents reviewed by member firm

Documents stored by member firm at no cost

## CONTACT US

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