Adviser Facilitated Estate Planning Solutions

View Legal

WHICH SERVICE LEVEL IS BEST FOR YOU AND YOUR CUSTOMER?

CONCIERGE	COMPREHENSIVE	COMPLIANCE
• Best for advisers with customers that do not fall within the Comprehensive or Compliance service levels. • Best for advisers with customers who want access to additional service and legal advice • Minimal data entry for advisers • Instructions can be submitted via the online interview; or via Word using this template	• Best for advisers with customers that do not fall within the Compliance service level • Best for advisers with customers who have legal questions and would like to speak with a lawyer to get the estate planning foundations right before preparation of documents • Minimal data input for advisers via the online interview as the lawyer will take instructions and the View Legal team will finalise the remaining data entry • Best for advisers with customers who answer 'Yes' to 1 or more of the questions in this Checklist	• Best for specialist estate planning advisers that have sophisticated customers who are engaged in the process and had initial discussions about their objectives with the facilitating adviser • Adviser is certain of all estate wishes for the customer – including full names and details to complete the online interview with 100% accuracy • Please note: if there are any amendments required to the initial interview submitted, an automatic upgrade to at least the Comprehensive service level will be required. In this scenario, the additional meeting is optional (however the price point will be as per the upgraded service level regardless)

SUGGESTED JOURNEY MAPS FOR EACH SERVICE LEVEL

Concierge	*Preflight (Robust Checklist & Free Review)*	*Adviser / Customer Meeting*	*Minimal Data Input via Online Interview Selecting the Concierge Service Level*	*Adviser / Customer / View Legal - Online Planning Meeting (Unlimited Length)*	*View Legal Produces All Documents*	*Draft Documents Emailed*	*Adviser / Customer / View Legal - Online Document Review Meeting (Unlimited Length)*	*Final Documents Posted for Signing*	*Signed Documents Sent to View Legal for Secure Storage*
Comprehensive	*Preflight (Robust Checklist & Free Review)*	*Adviser / Customer Meeting*	*Minimal Data Input via Online Interview Selecting the Comprehensive Service Level*	*Up to 60-Minute Adviser / Customer / View Legal - Online Planning Meeting*	*View Legal Produces All Documents*	*Draft Documents Emailed*	*Up to 60-Minute Adviser / Customer / View Legal - Online Document Review Meeting*	*Final Documents Posted for Signing*	*Signed Documents Sent to View Legal for Secure Storage*
Compliance	*Preflight (Robust Checklist & Free Review)*	*Adviser / Customer Meeting*	*Accurate and Complete Data Input via Online Interview Selecting Compliance Service Level*	*View Legal Produces All Documents*	*Draft Documents Emailed*	*Up to 45-Minute Adviser / Customer / View Legal - Online Document Review Meeting*	*Final Documents Posted for Signing*	*Signed Documents Sent to View Legal for Secure Storage*	

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	GUARANTEED FIXED PRICE 1 TESTAMENTARY TRUST		GUARANTEED FIXED PRICE MULTIPLE TESTAMENTARY TRUSTS		PROCESS, FRAMEWORK AND ACCESS TO SPECIALISTS
	SINGLE	COUPLE	SINGLE	COUPLE	
Concierge	$2,500	$3,500	$3,795	$4,400	*Two web-based meetings with specialist lawyer (unlimited time)*
Comprehensive	$1,350	$1,800	$1,925	$2,250	*Two web-based meetings with specialist lawyer (up to 2 hours in total)*
Compliance	$895	$1,250	$1,190	$1,500	*One web-based meeting with specialist lawyer (up to 45 minutes)*

EACH SOLUTION INCLUDES

- All will documents (including mirror wills for couples and testamentary trusts)
- Template memorandum of directions
- Enduring powers of attorney (for one jurisdiction)
- Enduring guardianship (for one jurisdiction)
- Web-based explanations by specialist lawyers
- Compliance certificate confirming all legal advice in relation to documents provided by View Legal Pty Ltd
- Document storage
- Unlimited access to online education material
- Yearly webinar – 'what's changed in estate planning' (opt in only)
- Adviser access to weekly adviser technical update blog posts (opt in only)
- Access to the on demand education videos in relation to key estate planning documents

REMEMBER TO CONSIDER THE FOLLOWING (VIEW LEGAL CAN ASSIST IN EACH OF THESE AREAS)

- ***If any superannuation nominations are required***
- ***Whether succession of control of related trusts (e.g. principal/ appointor roles) is needed***
- ***If strategic related advice in relation to issues such as asset protection is appropriate***
- ***For additional insights see the four pillars of holistic estate planning here***
- ***If additional attorney documents are required see the Power of Attorney Solutions here***

THINGS TO NOTE

- Each price is guaranteed in relation to the service provided, on the basis that the appropriate solution has been chosen for the customer's circumstances, for price certainty complete a Free Review here.
  If at any time you believe the value we provide does not reflect the agreed price please contact us immediately so we can agree an adjustment
- All prices are GST inclusive
- An upgrade to another service level is available at any time
- This product is not suitable for customers requiring an interpreter to read English or to understand spoken English, lack capacity, are deaf or blind, suffer other mental impairment, are suffering a terminal or life threatening illness or is currently in hospital
- Due to risks associated with wills that do not include testamentary trusts, those types of documents are only available via a tailored scope and pricing from View Legal
- If assistance outside the parameters of the selected package is required, we will provide a suggested scope and guaranteed fixed price for approval before proceeding
- There is no limit on the number of Testamentary Trusts available under the Multiple Testamentary Trust solution
- Instructions are submitted via online interview for Compliance and Comprehensive service levels
- Instructions provided via Word are only available via the Concierge service level
- All draft documents are delivered via email within 3 business days of provision of complete instructions
- All documents for signing are sent by post, unless email is requested, or if documents are needed in less than 5 business days, then the adviser or customer will need to arrange printing themselves
- The adviser must facilitate all aspects of the process, including:
  - complete and submit all instructions in line with the service level chosen
  - conduct preliminary discussions with customer in relation to the key aspects of estate planning
  - locate and submit to View Legal all requested documentation
  - generally attend the web-based meetings, at least to make introductions or chair the meeting
  - signing and witnessing of the documents
- Where couples wish to prepare wills not on mirror terms, individual packages will be required.
- We are constantly evolving our offerings based on customer feedback so please contact us if you have any questions
- This document is current as at 1 April 2023