

Adviser Facilitated Estate Planning Solutions

WHICH SERVICE LEVEL IS BEST FOR YOU AND YOUR CUSTOMER?

CONCIERGE	COMPREHENSIVE	COMPLIANCE
<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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

