

	GUARANTEED FIXED PRICE	EACH PACKAGE INCLUDES	VIEW LEGAL ASSUMPTION OF LIABILITY FOR ALL PACKAGES	PROCESS AND ACCESS TO SPECIALISTS
<i>Concierge</i>	\$1,650	Preparation of succession documentation for the nominated control role in the trust (e.g. principal, appointor, guardian or nominee) in accordance with the specific power in the trust deed	Covers: a. documentation produced b. legal sign-off that the nomination is appropriate in the context of the client's estate plan and the terms of the trust deed, provided that either (1) a 'Fact Find' is submitted confirming client's existing estate planning arrangements or (2) be done in conjunction with an Estate Planning Solution with View Legal	<ul style="list-style-type: none"> Up to 30 minute technology enabled meeting between adviser and specialist View Legal lawyer Meeting designed to explore all relevant alternatives collaboratively with adviser Once structuring approach has been agreed, adviser submits completed instruction form Legal documentation is prepared based on agreed instructions A deed of variation to insert the power to nominate a successor, to the extent the trust deed does not contain this power
<i>Comprehensive</i>	\$990			<ul style="list-style-type: none"> Up to 15 minute technology enabled meeting between adviser and specialist View Legal lawyer Meeting designed to explore all relevant alternatives collaboratively with adviser Once structuring approach has been agreed, adviser submits completed instruction form Legal documentation is prepared based on agreed instructions
<i>Compliance</i>	\$550			<ul style="list-style-type: none"> No discussion or advice provided to adviser Legal documentation is prepared based on instructions and review of fact find
<i>Entry</i>	\$385		Covers: a. only that the documentation produced and all the online question and answer interfaces are accurate	<ul style="list-style-type: none"> No discussion or advice provided to adviser Legal documentation is prepared based on instructions and review of fact find

THINGS TO NOTE

- The succession documentation produced will either be a deed of succession or a nomination clause in a will. The nomination clause in a will is only available in conjunction with an Estate Planning Solution with View Legal.
- A tax invoice for the agreed price will be provided at the time of providing the draft documents.
- Each price is guaranteed in relation to the service provided. 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
- Solution available only for discretionary trusts
- All submissions must include a copy of the executed trust deed, all variations and either (1) a 'Fact Find' confirming client's existing estate planning arrangements or (2) be done in conjunction with an Estate Planning Solution
- For all packages other than Concierge, the trust deed must contain a power permitting the controller to nominate a successor
- All prices are GST inclusive
- Instructions must be submitted via our website, or if no web form is currently available, then via an emailed instruction form
- For a deed of succession, unless printing option is selected, all documentation is provided electronically
- For a deed of succession, for printing, binding and delivery, add \$59 to the price
- This document is current as at 1 January 2018
- We are constantly evolving our offerings based on customer feedback so please contact us if you have any questions