

| BENCHMARKS | VIEW LEGAL |
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| <i>Format for engaging with us</i> | Instructions can be submitted via our website 24 hours a day, 7 days a week. |
| <i>Quality of documentation</i> | Highly specialised team of lawyers regularly review our precedents to ensure they reflect best practice across all relevant legal areas. |
| <i>Quality of data</i> | <p>All of our solutions are completely automated, which means that:</p> <ul style="list-style-type: none"> • There is no re-typing of data • Documents are generated automatically, in a manner of seconds • There is the ability to build IT 'plug ins' between your website and our system |
| <i>Choice of solutions</i> | We offer at least four service tiers for every product line, allowing advisers to choose the appropriate solution for each client. |
| <i>Pricing</i> | Upfront, fixed pricing with a money back guarantee. |
| <i>Time turn around</i> | <p>The products in our 'entity solutions' packages are provided same business day, usually within 2 hours.</p> <p>The products in our 'estate planning' and 'business owners' solutions are provided within 3 business days.</p> |
| <i>Legal liability</i> | <p>The legal liability is expressly outlined for all solutions.</p> <p>Other than the entry package, legal liability rests with View Legal.</p> |
| <i>Team supporting the solution</i> | <p>Our solutions are supported by a team of specialist lawyers (including the four View Legal directors) who are each recognised as authorities in tax, estate planning, asset protection, superannuation and business succession.</p> <p>Matthew Burgess, Tara Lucke and Patrick Ellwood are all fellows of the Tax Institute of Australia, and are regularly published in the leading Australian tax journal, the Weekly Tax Bulletin. We have also published text books in each area we specialise. The majority of lawyers hold dual degrees (primarily law and accounting).</p> |
| <i>Depth of solutions</i> | <p>View Legal has over 80 solutions available to advisers, with more being added regularly based on adviser feedback. Some of the most popular solutions include:</p> <ul style="list-style-type: none"> • Establishment of trusts, companies, SMSFs, instalment trusts • Changes of trustee • Trust deed, SMSF deed and Constitution updates • BDBNs and super wills • Wills incorporating testamentary trusts • Powers of attorney • Stakeholder agreements and insurance funded buy sell deeds |
| <i>Access to specialist legal advice</i> | All wholesale solutions give the adviser the ability to access an online meeting with a specialist lawyer to obtain strategic advice and legal sign off on the specific issues raised. |
| <i>Access to complementary bespoke solutions</i> | In addition to the wholesale solutions available online, View Legal has a specialist team of lawyers in tax, estate planning, superannuation, asset protection and business succession, who can assist where bespoke solutions are required. |
| <i>Jurisdictions</i> | View Legal is a national practice providing entity establishment, superannuation, business succession and estate planning solutions for all Australian jurisdictions. |
| <i>Loyalty program</i> | <p>Advisers can subscribe to our weekly blog, so they can stay up to date with legal developments, case studies and tips and tricks relating to tax, estate planning, superannuation, asset protection and business succession.</p> <p>We also hold technical webinars every 6 weeks to assist advisers with CPD requirements and their technical skills.</p> <p>Our VIP Platform gives advisers discounted (and in some cases, free) access to our technical webinars, our published technical books and our wholesale solutions.</p> |