



THE 7 STEPS TO SUCCESS

IMPLEMENTING VIEW'S TURN-KEY ADVISER FACILITATED ESTATE PLANNING PLATFORM

1. JOIN THE COMMUNITY



Become part of the View adviser community - AdVIEWser

2. PROCESS



Understand each aspect of the adviser facilitated process

3. OBTAIN A SCOPE



Obtain an adviser facilitated package suggested scope and fixed pricing with 3 service levels to choose from

4. POSITION



Position your service offering with your customer considering which service level best suits the customer's objectives

5. CAPTURE



Capture your learnings, improve your systems – and View's

6. REFLECT



Sharpen your saw

7. REPEAT



Rinse and repeat

THE WHY

Estate planning is arguably the go to solution for many financial advisers, accountants and risk advisers.

Indeed, adviser facilitated estate planning is one of the very few areas of the law where adviser teams and customers can work collaboratively and constructively.

View's web-based adviser facilitated estate planning platform is an adviser centric solution, ensuring advisers can deliver best fit legal outcomes, while completely managing risk and creating significant revenue opportunities.

View's adviser facilitated estate planning platform is a true 'triple play' – significantly faster, radically better customer experience and huge advances in value created.

THE HOW

View has developed a comprehensive framework to ensure all advisers can embed facilitated estate planning into their business.

There are 3 broad estate planning avenues View has developed for advisers.

1. Free Review Service

The free review service is, as the branding suggests, free.

Any adviser, at any time and as often as they choose, can provide View the material set out at [Appendix 1](#). The team at View will review this material and provide an obligation free recommendation as to the best next steps including a guaranteed up-front fixed price for View to assist (where appropriate).

The mantra we encourage advisers to embrace with the free review service is 'when in doubt, flick it out'. In other words, if an adviser is unsure what avenue to select – simply [submit a free review](#) and leave it to View to give you the answer.

2. Traditional Referral Model

The traditional referral model is built around some of Australia's leading estate planning specialists, leveraging the tech platform View has built to provide bespoke estate planning solutions.

Generally this solution is accessed in one of 3 situations, namely:

- a. the customer circumstances are of a complexity that the wholesale platform is inappropriate;
- b. the customer, or their adviser, would prefer a customised approach; or
- c. the adviser does not wish to facilitate, or project manage, the estate planning process. Some reasons for this include not specialising in the area, having other priorities, not having experience in facilitation (despite otherwise having skills in estate planning) or choosing not to build a pricing model for facilitating.

3. Wholesale (business to business) Adviser facilitated platform

This approach leverages View's platform to allow financial planners, accountants, risk advisers and estate planning consultants to radically improve their estate planning offerings.

The platform (which is constantly iterated based on user feedback) leverages the learnings of the founder of what was widely acknowledged as Australia's first virtual law firm ('elawyer' founded by View's Matthew Burgess).

The platform combines the intellectual property developed in delivering legal solutions for the upper echelons of the Australian high net wealth community with proprietary technology. Learn more about the estate planning process at [Appendix 3](#).

The outcome for advisers is the ability to deliver customer centric estate planning solutions, that simultaneously create immediately profitable income streams for each adviser's business.

THE WHAT

This strategy paper 'The 7 Steps to Success - Implementing View's Turn-key Adviser Facilitated Estate Planning Platform' unlocks for advisers a step by step guide on how they can immediately implement facilitated estate planning for customers providing exceptional value with this add on to your product suite.

GUIDED LEARNING OF THE 7 STEPS VIA VIEWUNI'S ONLINE COURSE (PART OF YOUR MEMBERSHIP)

This online course provides step-by-step modules to further assist with each step in this strategy paper. It is not compulsory to do the course, however, many advisers use it as a base for team training and refreshing their knowledge in holistic estate planning and pricing customers.

Modules in the course are a mix of downloadable tips (PDF format), videos and podcasts to enable you and your team to learn in your preferred way. There is approximately 15 hours of training content for your immediate use.

You can preview the course [here](#).

THE 7 STEPS TO SUCCESS TO IMPLEMENT VIEW'S TURN-KEY ADVISER FACILITATED ESTATE PLANNING PLATFORM

The 7 steps explored in order in this strategy paper are as follows:

1. JOIN THE COMMUNITY



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2. PROCESS



Understand each aspect of the adviser facilitated process

3. OBTAIN A SCOPE



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Rinse and repeat

STEP 1: BECOME PART OF THE VIEW COMMUNITY

Advisers wishing to use View's adviser facilitated platform must be accredited. Learn more [here](#).

And remember the mantra: "if in doubt; flick it out". In other words, if you have any questions with any aspect of this step simply contact View at: solutions@viewlegal.com.au or visit our [FAQs](#).

STEP 2: UNDERSTAND EACH ASPECT OF THE ADVISER FACILITATED PROCESS

The key steps are as follows:

1. ADVISER OBTAINS CUSTOMER INSTRUCTIONS & SUBMITS FREE REVIEW TO OBTAIN PRICING



Many advisers will collect the key data using either the [Free Review checklist](#) or [word instruction sheet](#)

2. A SERVICE LEVEL AND FIXED PRICE IS SELECTED FROM SCOPE PROVIDED



3. INSTRUCTIONS ARE SUBMITTED



4. VIEW PROVIDES DRAFT DOCUMENTS



These will be emailed to the adviser (and the customer directly if requested) within 72 business hours of complete instructions being received

5. ONLINE MEETING WITH CUSTOMER WHERE VIEW PROVIDES ADVICE



Advisers can book this meeting at the appropriate time. Almost all advisers will at least do the introductions at the start of the meeting, and most advisers also sit in and participate through the entire meeting

6. FINAL DOCUMENTS ISSUED FOR SIGNING



As this area of the law requires 'wet' signatures the documents are physically posted or delivered electronically for printing within 72 business hours after the meeting, with detailed signing and witnessing instructions. Some, but not all, advisers host the signing meeting with their customer

7. VIEW ISSUES CERTIFICATE OF COMPLIANCE TO ADVISER



This is arguably the most important step from a risk perspective and confirms that View is the only adviser in the process who has provided legal advice

8. VIEW PROVIDES STORAGE OF SIGNED DOCUMENTS



This step is optional, however if selected also includes View reviewing the signed documents to ensure they appear to have been executed and witnessed correctly

And remember the mantra: "if in doubt; flick it out". In other words, if you have any questions with any aspect of this step simply contact View at: solutions@viewlegal.com.au or visit our [FAQs](#).

STEP 3: OBTAIN A SCOPE

View assists advisers and their customers exclusively on an upfront money back service guaranteed fixed price basis.

To ensure the appropriate package is provided for your customer's circumstances, submit a [free review](#) on the website.

View then provides a suggested scope of work and guaranteed fixed pricing, with a minimum of 3 service level choices.

Alternatively, launched in 2023, adviser can leverage a customised monthly membership model - the first of its kind in the holistic estate planning space in Australia. Under this model, product inclusions and monthly subscription pricing are tailored to each adviser and designed to maximise your firms return on investment. Click [here](#) to secure a meeting time to learn more.

View also offers adviser access to exclusive mentoring in relation to positioning and pricing of their facilitated solutions, as part of its 'Firm of the Future - Now' consulting services, leveraging the insights Matthew Burgess has gained access to as one of only 3 Australian Fellows of the international think tank, [VeraSage](#).

Learn more about View's key programs [here](#).

Learn more about this aspect of the framework in the following [video recording](#).

And remember the mantra: "if in doubt; flick it out". In other words, if you have any questions with any aspect of this step simply contact View at: solutions@viewlegal.com.au or visit our [FAQs](#).

STEP 4: POSITION YOUR SERVICE OFFERING WITH YOUR CUSTOMER AND CHOOSE THE SERVICE LEVEL

There is a vast array of tools available to help advisers position View's adviser facilitated estate planning platform with a customer via the AdVIEWser membership dashboard.

Examples also include:

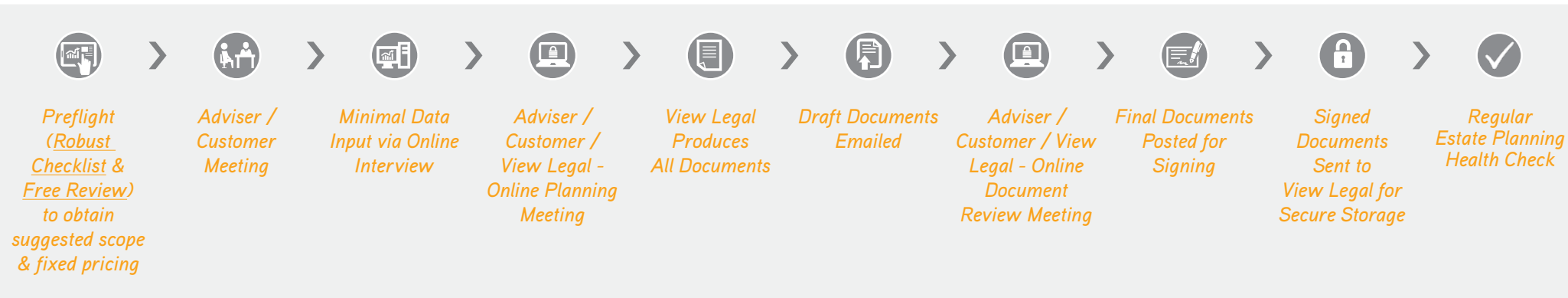
- a. [Apps](#) that provide strategy papers
- b. [Text books](#), including our most popular publication for advisers in the estate planning space, namely 'Estate Planning War Stories'
- c. On going [education programs](#)
- d. [Weekly blog posts](#)

And remember the mantra: "if in doubt; flick it out". In other words, if you have any questions with any aspect of this step simply contact View at: solutions@viewlegal.com.au or visit our [FAQs](#).

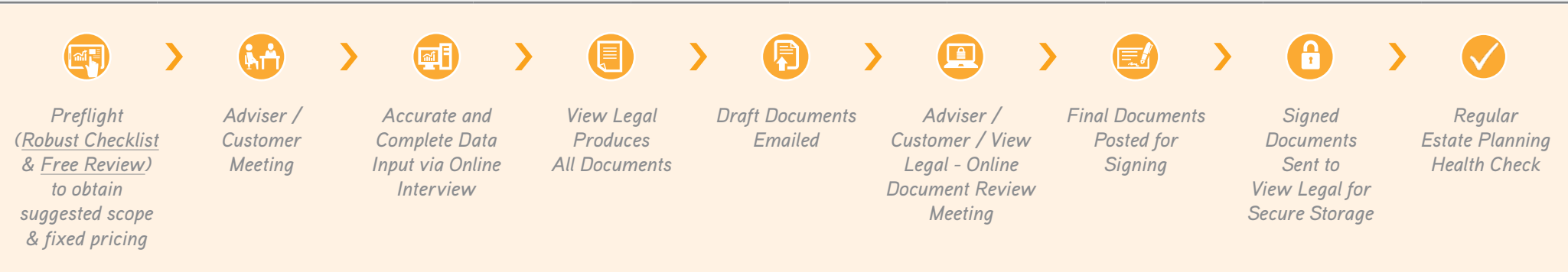


EXAMPLE OF CUSTOMER JOURNEY MAP

Two meetings solution



One meeting solution



STEP 5: CAPTURE YOUR LEARNINGS, IMPROVE YOUR SYSTEMS – AND VIEW'S

View is founded on the belief that we are only as good as our next performance.

We constantly seek adviser feedback on how to improve the platform, including:

- a. beta testing of unreleased model iterations;
- b. 'uber' style ratings at the end of each web-based meeting;
- c. emails to solutions@viewlegal.com.au.

We encourage advisers to similarly look to capture their learnings and the tool we recommend in this regard is known as 'AAR' or 'After Action Reviews'. Learn more here:

AARs explained (podcast)

Interview with Chris 'Elroy' Stricklin from [The Soul of Enterprise: Business in the Knowledge Economy](#) in Podcasts.

And remember the mantra: "if in doubt; flick it out". In other words, if you have any questions with any aspect of this step simply contact View at: solutions@viewlegal.com.au or visit our [FAQs](#).

STEP 6: SHARPEN YOUR SAW

As flagged a number of times above, there is a wealth of material published by View to help you continue to develop your offering.

One of the key strategies, not mentioned previously, is using checklists to capture your learnings.

We also encourage you to regularly review your membership dashboard to access new and ongoing education and tools for integrating holistic estate planning to grow your business.

And remember the mantra: "if in doubt; flick it out". In other words, if you have any questions with any aspect of this step simply contact View at: solutions@viewlegal.com.au or visit our [FAQs](#).

STEP 7: RINSE AND REPEAT

Our experience is that once advisers have facilitated more than 5 estate plans, it becomes part of their firm's culture and a core part of their customer value proposition.

Once estate planning becomes an embedded facilitated solution for an adviser, it can be the launch pad for a variety of other adviser facilitated solutions offered by View in areas such as:

- a. Probate and estate administration;
- b. Business succession;
- c. Entity establishment.

As Nike says, 'Just Do It' or in Seth Godin's words, '[Ship it](#)', or for the video version see [here](#).

Therefore – the next step, if you have not yet completed a facilitated estate plan through View, or have not done so for more than 6 months, is to choose your easiest customer situation – including yourself if your arrangements are not up to date, go to [step 1](#) and start. Now.

And remember the mantra: "if in doubt; flick it out". In other words, if you have any questions with any aspect of this step simply contact View at: solutions@viewlegal.com.au or visit our [FAQs](#).



ABOUT VIEW

At View Legal our mantra is to be ‘for friends’.

In other words creating solutions and value propositions that are compelling to our friends.

To achieve our vision, we have set out to fundamentally and radically revolutionise access to high quality legal advice, in our areas of deep specialisation—structuring, tax, trusts, asset protection, business sales, estate and succession planning.

To help explain the approach View is taking to uniquely deliver valuable legal solutions, the following table lists 10 traditional ways law firms have operated (and, almost exclusively, continue to operate) and the new vision that View is built around.

OLD VIEW	VIEW LEGAL
Bill customers on hourly rates (or various, increasingly elaborate, permutations on the theme) and have no particular interest in customer perception of value	Customers provided up front ‘SPS Guarantee’ – that is service and price satisfaction is guaranteed with all work undertaken following upfront fixed pricing
Everything tracked on a timesheet. The longer something takes, the better	No timesheets. Sophisticated project management tools used to help ensure customer expectations are exceeded
Quality is defined by the law firm	Quality is defined by the customer
‘Impressive’ CBD office space, with ‘dominant’ fit outs	View meets where best suits customers. No permanent CBD space retained
Intellectual property is how we make money and should be guarded jealously	Intellectual property is how we create trust and should be shared freely
Lawyers striving to deliver near-perfect technical excellence	All service designed to be fit-for-purpose, aligning with collaboratively agreed customer objectives
Lawyers cultural focus on ‘is this billable’ for the firm	Lawyers cultural focus on ‘is this valuable’ for the customer
‘Leveraging’ of full-time lawyers to do the bulk of the work serving customers	Flexible work practices that match supply with demand
Constant focus on the ‘need for diversity’ of gender	Only focus on diversity of thought
Revenue growth the #1 goal	Exceeding customer expectations #1 goal

Significant inspiration provided by VeraSage. Partly adapted with permission of George Beaton, Beaton Capital.

If you would like to learn more about any of the above solutions or View more generally email solutions@viewlegal.com.au.

INTERESTED TO LEARN MORE?

1. Subscribe to the free weekly blog posts:

To subscribe to the [blog](#), simply enter your email address in the subscription box in the right hand column or alternatively, subscribe through your preferred RSS feed from your browser.

2. View Communities

The [View Communities](#) membership platform provides you with significant access to our community discussion group, free access to our webinars, workshops and roadshows, unlimited access to many of our ebooks, and mentoring sessions with specialist View lawyers.

3. Education programs

View Legal specialises in all forms of adviser education and collaborative learning. We are fortunate to regularly present to accountants, financial planners, other lawyers and risk advisers.

Our programs are tailored to meet your specific requirements and can be delivered in lengths ranging from 20 minute web-based updates to 5 day in-house courses (and every permutation in between) and formats including in person, webinar and video streaming. Our most popular sessions tend to be 90 minute team trainings, which can be recorded for future use.

A sample of some of our current topics is set out at the following [link](#).

You can also explore and enrol to all of our View University courses [here](#), including the course that complements this strategy paper.

More generally, each View University course is designed to be relevant for all advisers including accountants, financial advisers and lawyers, other than lawyers who have specialised in the trusts and estate planning space for many years.

With 35 discrete learning modules and over 15 hours of technical content in each course, including webinars, vidcasts, and technical papers, the university level courses are the first of their kind in the Australian marketplace.

Learn more about each course and View University more generally [here](#).

4. Business model iteration

Matthew Burgess has been recognised as a thought leader in delivery of professional service solutions by peers, industry commentators and competitors. He regularly presents keynotes in this area as well as coordinating and facilitating firm retreats and education programs.

Indeed, Matthew is the only practising lawyer in Australia who is a Certified Speaking Professional (CSP), a designation conferred by the Professional Speakers Australia (PSA), the industry's leading organisation. The CSP is likewise the speaking profession's international measure of professional platform competence.

Matthew is counted among the rare 12 percent of professional speakers worldwide who currently hold the CSP credential.

Learn more about Matthew's business model presentations [here](#).

Learn more about the 3 business books Matthew has written [here](#).

A SELECTION OF BOOKS FROM VIEW LEGAL

For all the latest books please visit [here](#).



WHAT SOME ADVISERS SAY ABOUT USING THE VIEW PLATFORM

“ The way we can get customer estate planning documents completed quickly and cost effectively without having to have clients (or us on their behalf) complete a whole ‘know your client’ process from scratch with a 3rd party law firm is why we use View’s platform.

What we like most about the platform is the ability to provide a valued service line to our customers. The lawyers I work with are knowledgeable and a pleasure to work with.

With View’s platform we get a price that is fair, access to high quality documents and not take legal risks ourselves.

Before working with View I did not realise the legal risks I was taking on by creating estate planning documents, now I have peace of mind and my clients have a legally signed off solution for their estate planning needs.

Ensuring that our firm remains the first point of contact for our clients is completely supported via the View platform - this is key for us.. ”

WHAT ADVISERS SAY ABOUT THE ONLINE MEETING WITH VIEW

“ Presented clearly and easy for the clients to understand.

Lawyer was great. They explained the documents clearly and thoroughly and made it a good experience for the client.

Was great. Clients feedback was that they enjoyed it and understood things more.

Clients left the meeting confident, comfortable and informed.

Well run sessions.

Lawyer was clear and concise. Client and her kids were comfortable and confident to proceed.

A good discussion, helped in formulating a more workable solution. ”

CONTACT DETAILS

View Legal

Email: solutions@viewlegal.com.au
Website: <http://www.viewlegal.com.au/>
Blog: <http://blog.viewlegal.com.au/>
Twitter: https://twitter.com/view_legal
Linked in: <https://ph.linkedin.com/company/view-legal>



View Legal

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Disclaimer

This paper covers legal and technical issues in a general way. It is not designed to express opinions on specific cases. This paper is intended for information purposes only and should not be regarded as legal advice. Further advice should be obtained before taking action on any issue dealt with in this publication.

The View team has invested over a number of years to develop a significant amount of adviser centric content.

A core focus in this regard has been the publication of books.

Inspired by one of our heroes, Dr Seuss, all books have covers colour-coded to help identify the genre.











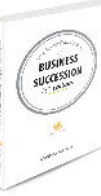
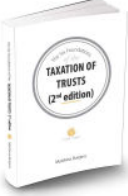
In particular:

Orange covers are 'reference guides'. These books provide practically focused content, often sourced from material originally created to improve the skill set of View team members.

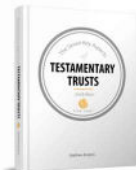











Black covers are 'workbooks'. These books again provide practically focused content, however, are designed to be actively 'consumed' by readers; invariably, there is space deliberately set aside for note taking by the reader.

White books are 'technical'. These publications are focused solely on providing deep technical content. In all cases, while there will be practical examples, there is a deliberate emphasis on legislative provisions and important court decisions. In most instances, the content will be equivalent to publication standard for organisations such as the Tax Institute of Australia, Thomson Reuters Weekly Tax Bulletin and LexisNexis.

Select the book format you wish to order

 <p>Estate Planning War Stories – Reference Guide \$29.95 <input type="checkbox"/>Paperback <input type="checkbox"/>Ebook</p>	 <p>Inside Stories – Reference Guide Volume II (collection of blog posts) \$60.00 <input type="checkbox"/>Paperback <input type="checkbox"/>Ebook</p>
 <p>Inside Stories 2023 \$9.95 <input type="checkbox"/>Ebook only</p>	 <p>The Dream Enabler – Reference Guide \$30.00 <input type="checkbox"/>Paperback <input type="checkbox"/>Ebook</p>
 <p>Post Death Testamentary Trusts \$29.95 <input type="checkbox"/>Paperback <input type="checkbox"/>Ebook</p>	 <p>Blended Families \$29.95 <input type="checkbox"/>Paperback <input type="checkbox"/>Ebook</p>
 <p>40 Forms of Trusts – Workbook \$29.95 <input type="checkbox"/>Paperback <input type="checkbox"/>Ebook</p>	 <p>The Dream Enabler – Workbook \$30.00 <input type="checkbox"/>Paperback <input type="checkbox"/>Ebook</p>
 <p>Probate and Estate Administration Workbook \$29.95 <input type="checkbox"/>Paperback <input type="checkbox"/>Ebook</p>	 <p>The Science of Sales - Workbook \$29.95 <input type="checkbox"/>Paperback <input type="checkbox"/>Ebook</p>
 <p>The Seven Foundations of Business Succession (5th edition) <input type="checkbox"/>Paperback with appendices \$135.00 <input type="checkbox"/>Ebook with appendices \$135.00 <input type="checkbox"/>Paperback without appendices \$80.00 <input type="checkbox"/>Ebook without appendices \$80.00</p>	 <p>The Six Foundations of Taxation of Trusts (2nd edition) <input type="checkbox"/>Paperback with appendices \$135.00 <input type="checkbox"/>Ebook with appendices \$135.00 <input type="checkbox"/>Paperback without appendices \$80.00 <input type="checkbox"/>Ebook without appendices \$80.00</p>



	The Seven Key Aspects of Testamentary Trusts \$60.00 <input type="checkbox"/> Paperback <input type="checkbox"/> Ebook		The Nine Steps to a Complete Estate Plan \$60.00 <input type="checkbox"/> Paperback <input type="checkbox"/> Ebook
	The Five Foundations of SMSFs \$60.00 <input type="checkbox"/> Paperback <input type="checkbox"/> Ebook		The Nine Foundations of Asset Protection \$60.00 <input type="checkbox"/> Paperback <input type="checkbox"/> Ebook
	Five Essential Estate Planning Articles \$60.00 <input type="checkbox"/> Ebook only		The Dream Enabler \$60.00 <input type="checkbox"/> Paperback <input type="checkbox"/> Ebook
	Helpful Heuristics Handbook \$35.00 <input type="checkbox"/> Paperback <input type="checkbox"/> Ebook		101 Tips for Staying Young and Foolish <input type="checkbox"/> Hardcover \$50.00 <input type="checkbox"/> Paperback \$35.00 <input type="checkbox"/> Ebook \$35.00
	Bad Dad (and other Musing) <input type="checkbox"/> Hardcover \$50.00 <input type="checkbox"/> Paperback \$35.00 <input type="checkbox"/> Ebook \$35.00		Laws for Life <input type="checkbox"/> Hardcover \$50.00 <input type="checkbox"/> Paperback \$35.00 <input type="checkbox"/> Ebook \$35.00
	101 Lawyer Jokes \$20.00 <input type="checkbox"/> Paperback <input type="checkbox"/> Ebook		101 Accountant Jokes \$20.00 <input type="checkbox"/> Paperback <input type="checkbox"/> Ebook

Customer details

Name	
Email	
Postal address	

Payment to be made by - Direct Credit to National Australia Bank Account

BSB: 084004
Account No: 84-589-9839

Please quote 'Book order – [insert name]' in the subject line.

Credit Card (*Please note we do not accept American Express. Please send details to accounts@viewlegal.com.au):

Name on card			
Card number			
Expiry date		CCV	
Card Type*	<input type="checkbox"/> VISA	<input type="checkbox"/> MasterCard	
Total amount to charge	\$		

View Legal Pty Ltd ABN 39 168 702 707
This receipt is treated as a Tax Invoice, GST included.
Please retain a copy for your tax records