



View Legal

# 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

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 [complete 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



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

### 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

## STEP 1: BECOME PART OF THE VIEW COMMUNITY

Advisers wishing to use View's adviser facilitated platform must be accredited. For details on how to become accredited email [solutions@viewlegal.com.au](mailto:solutions@viewlegal.com.au).

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](mailto:solutions@viewlegal.com.au).

## STEP 2: UNDERSTAND EACH ASPECT OF THE ADVISER FACILITATED PROCESS

The key steps are as follows:

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



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



3. INSTRUCTIONS ARE COMPLETED



4. VIEW PROVIDES DRAFT DOCUMENTS



5. ONLINE MEETING WITH CUSTOMER WHERE VIEW PROVIDES ADVICE



6. FINAL DOCUMENTS ISSUED FOR SIGNING



7. VIEW ISSUES CERTIFICATE OF COMPLIANCE TO ADVISER



8. VIEW PROVIDES STORAGE OF SIGNED DOCUMENTS



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](mailto:solutions@viewlegal.com.au).

### 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, complete a [free review](#) on the website.

View then provides a suggested scope of work and guaranteed fixed pricing. To learn more contact [solutions@viewlegal.com.au](mailto:solutions@viewlegal.com.au).

### 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.

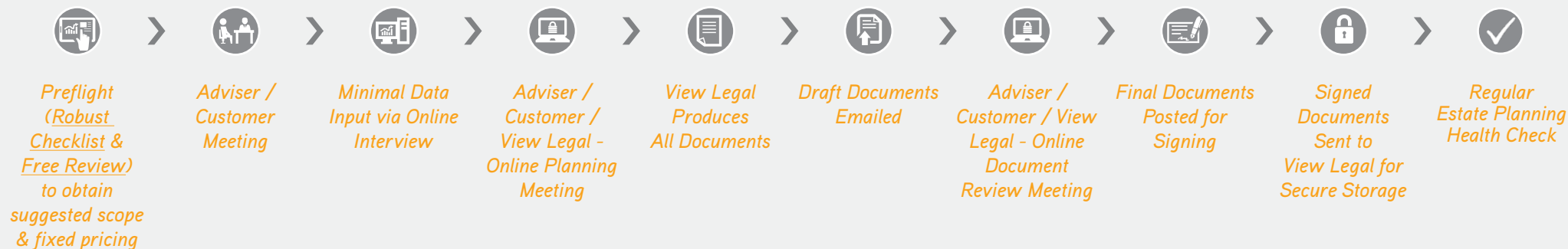
Examples also include:

- a. Access to exclusive questions and answers about Holistic Estate Planning
- b. Strategy papers
- c. [Text books](#), including our most popular publication for advisers in the estate planning space, namely 'Estate Planning War Stories'
- d. Ongoing [education programs](#)
- e. [Weekly blog posts](#)

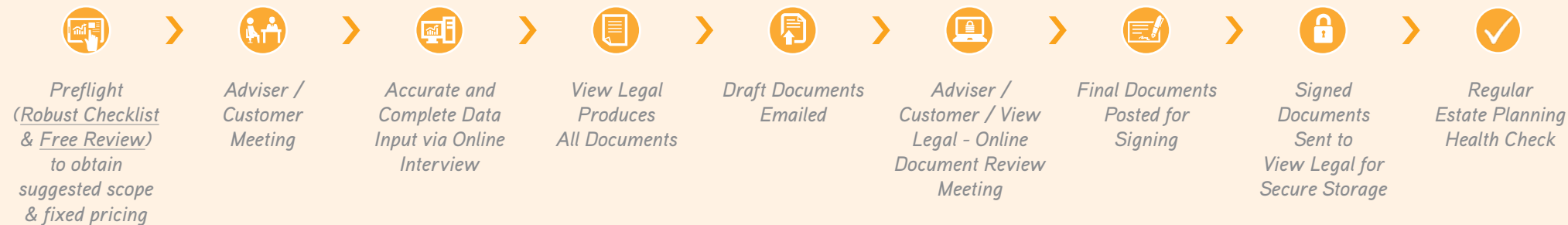
And remember the mantra: "if in doubt; flick it out". In other words, if you have any questions with any aspect of this step simply contact View at: [solutions@viewlegal.com.au](mailto:solutions@viewlegal.com.au).

## 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.

If you have any questions with any aspect of this step simply contact View at: [solutions@viewlegal.com.au](mailto:solutions@viewlegal.com.au).

## 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.

If you have any questions with any aspect of this step simply contact View at: [solutions@viewlegal.com.au](mailto:solutions@viewlegal.com.au).

## 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.

A possible 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](mailto:solutions@viewlegal.com.au).



## 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](mailto: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, which can be recorded for future use.

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

To learn more contact: [solutions@viewlegal.com.au](mailto:solutions@viewlegal.com.au).

### 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.

To learn more contact: [solutions@viewlegal.com.au](mailto:solutions@viewlegal.com.au).

## 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](mailto:solutions@viewlegal.com.au)  
Website: <http://www.viewlegal.com.au/>  
Blog: <http://blog.viewlegal.com.au/>  
Twitter: [https://twitter.com/view\\_legal](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.

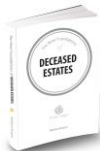
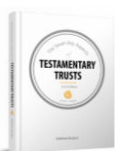







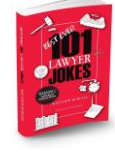

**Black covers** are 'workbooks'. These books again provide practically focused content, however, are designed to be actively 'consumed' by readers; invariably, there is space deliberately set aside for note taking by the reader.

**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

 <b>Estate Planning War Stories – Reference Guide</b> <input type="checkbox"/> Paperback \$29.95	 <b>Inside Stories – Reference Guide Volume II (collection of blog posts)</b> <input type="checkbox"/> Paperback \$60.00
 <b>Inside Stories 2024</b> <input type="checkbox"/> Ebook only \$9.95	 <b>The Dream Enabler – Reference Guide</b> <input type="checkbox"/> Paperback \$30.00
 <b>Post Death Testamentary Trusts</b> <input type="checkbox"/> Paperback \$29.95	 <b>Blended Families Workbook</b> <input type="checkbox"/> Paperback \$29.95
 <b>40 Forms of Trusts Workbook</b> <input type="checkbox"/> Paperback \$29.95	 <b>The Science of Sales Workbook</b> <input type="checkbox"/> Paperback \$29.95
 <b>Probate and Estate Administration Workbook</b> <input type="checkbox"/> Paperback \$29.95	 <b>Trust Horror Stories Workbook</b> <input type="checkbox"/> Paperback \$29.95
 <b>The Dream Enabler Workbook</b> <input type="checkbox"/> Paperback \$30.00	 <b>The Dream Enabler</b> <input type="checkbox"/> Paperback \$60.00
 <b>The Six Foundations of Taxation of Trusts (2nd edition)</b> <input type="checkbox"/> Paperback with appendices \$135.00 <input type="checkbox"/> Paperback without appendices \$80.00	 <b>The Seven Foundations of Business Succession (5th edition)</b> <input type="checkbox"/> Paperback with appendices \$135.00 <input type="checkbox"/> Paperback without appendices \$80.00



 <p><b>The Nine Foundations of Deceased Estates</b></p> <p><input type="checkbox"/> Paperback with appendices \$135.00</p> <p><input type="checkbox"/> Paperback without appendices \$80.00</p>	 <p><b>The Seven Key Aspects of Testamentary Trusts</b></p> <p><input type="checkbox"/> Paperback \$60.00</p>
 <p><b>The Five Foundations of SMSFs</b></p> <p><input type="checkbox"/> Paperback \$60.00</p>	 <p><b>The Nine Foundations of Asset Protection</b></p> <p><input type="checkbox"/> Paperback \$60.00</p>
 <p><b>The Nine Steps to a Complete Estate Plan</b></p> <p><input type="checkbox"/> Paperback \$60.00</p>	 <p><b>Laws for Life</b></p> <p><input type="checkbox"/> Hardcover \$50.00</p> <p><input type="checkbox"/> Paperback \$35.00</p>
 <p><b>101 Tips for Staying Young and Foolish</b></p> <p><input type="checkbox"/> Hardcover \$50.00</p> <p><input type="checkbox"/> Paperback \$35.00</p>	 <p><b>Bad Dad (and other Musing)</b></p> <p><input type="checkbox"/> Hardcover \$60.00</p> <p><input type="checkbox"/> Paperback \$35.00</p>
 <p><b>Helpful Heuristics Handbook</b></p> <p><input type="checkbox"/> Paperback \$35.00</p>	 <p><b>101 Lawyer Jokes</b></p> <p><input type="checkbox"/> Paperback \$20.00</p>
 <p><b>101 Accountant Jokes</b></p> <p><input type="checkbox"/> Paperback \$20.00</p>	

## Customer details

<b>Name</b>	
<b>Email</b>	
<b>Postal address</b>	

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

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

**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.

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