

# Insurance Facilitation Process

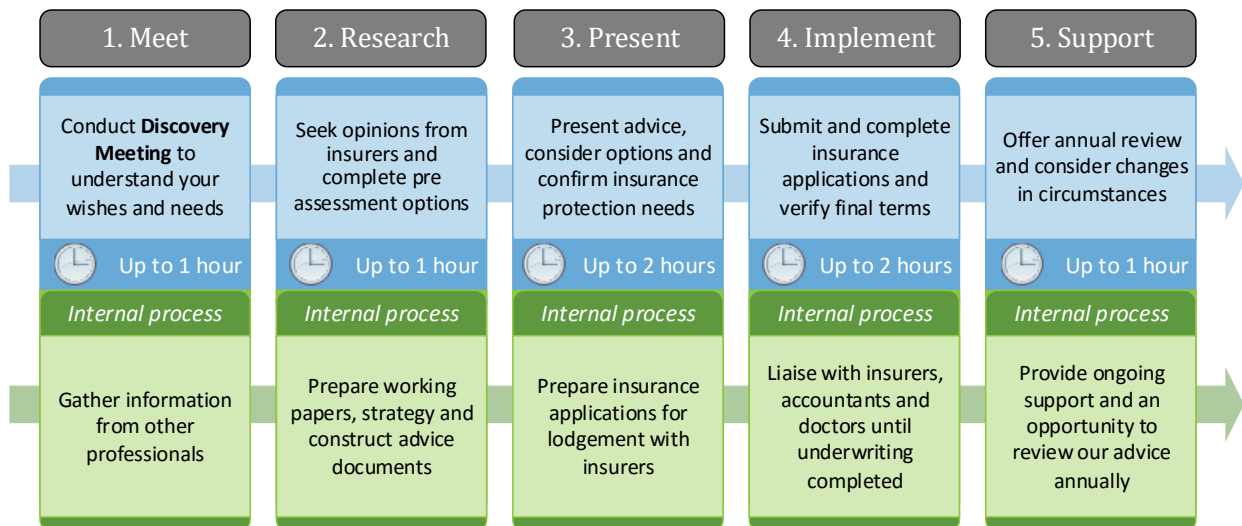


## Understanding what's most important to you...

At Succession Matters, Insurance Facilitation is all about understanding and implementing what is most important to you.

Through our unique no obligation Discovery Meeting and by working collaboratively with other professionals, we identify how to securely protect you and your family financially.

Our process involves the following steps:



# Insurance Facilitation Process



## Insurance Facilitation - Fees

Our services are provided in three stages as outlined below:

- Advice preparation
- Implementation of insurance
- Review and ongoing support

Stage	Details	Minimum fee
Advice (Steps 1-3)	Our advice preparation includes up to 7 hours of time.	\$1,100*
Implementation (Step 4)	Implementation of required Insurance cover/s	Outlined in Advice**
Review (Step 5)	Provide ongoing Insurance service	Outlined in Advice**

\*All items are inclusive of GST

\*\*Option of fee and/or commission

## Ongoing Insurance Service

At Succession Matters, our ongoing insurance service ensures our advice remains relevant and up to date even if your circumstances change.

Support	Claims	Audit	Updates
Liaise between you and the insurer	Facilitate claims management process	Maintaining relevant cover	Keeping in touch
Liaison	Facilitator	Assessor	Adviser
Provide updated contact or payment details. Obtain annual statements to complete your tax returns	Act as the conduit between all parties from initial lodgement through to payment of claim	Automated annual insurance audit, to ensure your insurance remains relevant and adequate	Offer annual <b>Discovery Meeting</b> , newsletters and legislative updates