

Insurance Service



Understanding what is most important to you...

At Succession Matters, our Insurance Service is about understanding what is most important when it comes to protecting you and your family. Our experienced team will work collaboratively with you and other professionals, to ensure we get the best possible outcome.

Our Insurance Process



Insurance Service

We guide you through our process of:

- Discovery
- Research and Strategy
- Prepare and Present Advice
- Submit and Confirm your Personal Protection
- Review and provide Ongoing Service

Remuneration

Stage	Steps	Details	Fee
Advice	1 - 5	Research, prepare and present advice	\$850 - \$1,650
Implementation	6 - 7	Submit and confirm your Personal Protection	Outlined in Advice**
Review	8	Review and provide ongoing service	Outlined in Advice**

• All fees are inclusive of GST

** Option of fee and/or commission

Ongoing Insurance Service

Our ongoing insurance service ensures your personal protection remains relevant and reflects any change in your circumstances.

Supporting You	Review	Updates	Claims Service
Providing ongoing administration assistance for any queries	Ensure your Personal Protection remains relevant and competitive	Keeping you informed	Being there when you need us the most