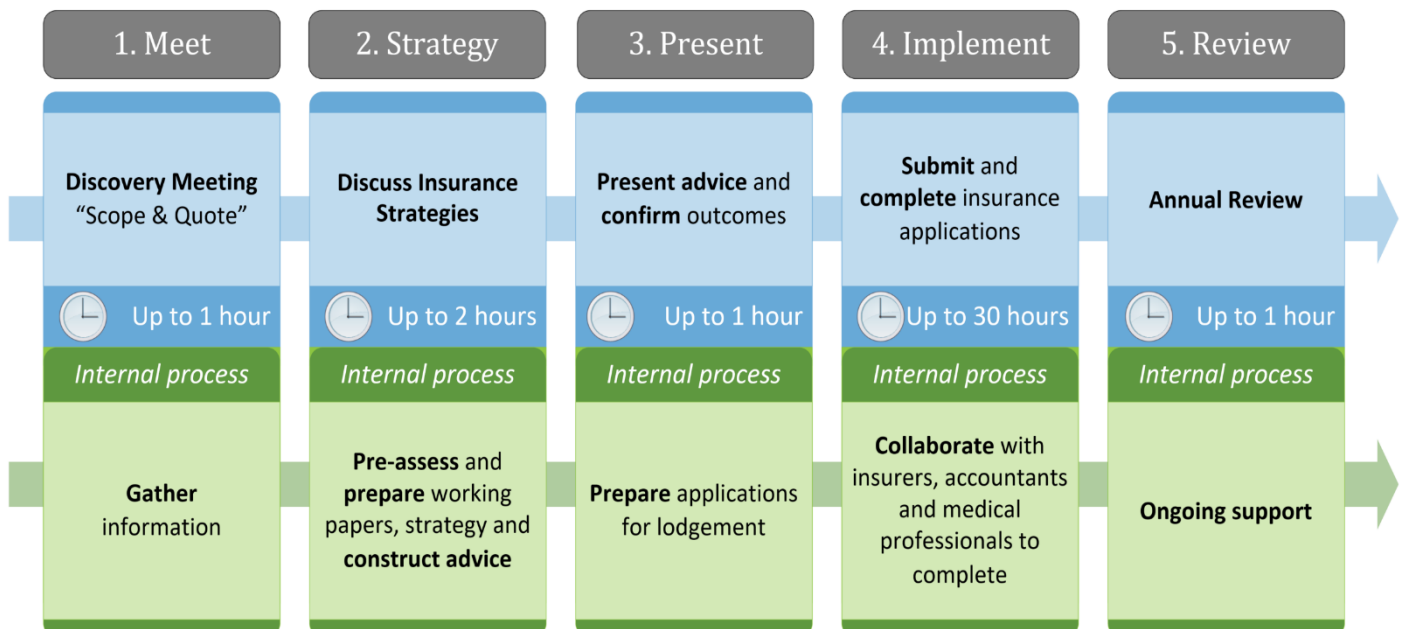


Insurance Service



Understanding what's most important to you...

At Succession Matters, our Insurance Service is about understanding and implementing what's most important when it comes to protecting you and your family. Our experienced team will work collaboratively with other professionals ensuring we create the right solution.





Insurance Service - Remuneration

Our services are provided in three stages:

1. Advice
2. Implementation
3. Review and ongoing support

Stage	Details	Minimum fee
Advice (Steps 1-3)	Our advice preparation includes up to 7 hours of time	\$833 - \$1,650
Implementation (Step 4)	Implementation of required Insurance cover/s	Outlined in Advice**
Review (Step 5)	Review and provide ongoing Insurance service	Outlined in Advice**

• All fees 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 current to changes in circumstances.

Support	Claims	Audit	Updates
Liaise between you and the insurer	Claims assessment	Maintain relevant cover	Remaining informed
Liaison	Facilitator	Assessor	Adviser
Provide administration including tax statements	The conduit between client and insurer	Maintain best value solution	Review Discovery Meeting