

Why Succession Matters

- Our name positions what we do – *helping your clients with their Personal Estate & Business Succession needs, coupled with appropriate Insurance solutions where required.*
- As **SPECIALISTS**, we pride ourselves in knowing what we do best.
- We have difficult but **IMPORTANT** conversations through our unique **DISCOVERY** process, which uncovers what matters most to your clients, their needs and demonstrates our value.
- We scope our work and provide a **FIXED-PRICE-PACKAGE**, based on what your clients need.
- We work **COLLABORATIVELY** with you, and other professionals, to ensure the best possible advice & outcome for your clients.
- Importantly, we provide a **FACILITATOR** role to “make it happen” and keep everyone accountable and informed along the way.
- We are **PRIVATELY OWNED**, have our own AFSL and aspire to seek the best possible insurance solutions for your clients, with over 60 years of specialist experience.
- We **FACILITATE**, on average, 15 life insurance claims per month, so have the **EXPERTISE** to get claims paid for your clients with over \$20m in claim payments.
- We **FACILITATE**, on average 4 Estate & Business Succession plans per month, so have the **EXPERIENCE** to resolve complex estate challenges with over 230 succession plans in place.
- Our aim is to be a genuine value-add for **YOUR** model.
- As a small business, we also **IDENTIFY** with other small business owners and understand their unique needs and challenges.
- We aspire for **EXCELLENCE**, balanced with a friendly, caring and professional manner.
- We have the right **CHOICES** of insurance & legal solutions to meet both your clients needs & budget.