

# 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 applicable.*
- As **SPECIALISTS** we pride ourselves in knowing what we do well and equally what we don't do.
- We have difficult but important conversations through our unique **DISCOVERY** process which uncovers areas of need and demonstrates our value.
- We scope our work and provide a **FIXED-PRICE-PACKAGE** based on what your clients want and need.
- We work **COLLABORATIVELY** with you and other professionals to ensure the best possible advice & outcomes for your clients.
- Importantly, we provide a **FACILITATOR** role to make it happen and keep everyone accountable and informed.
- We have our own AFSL and aspire to seek the best possible insurance solutions for your clients with over 50 years of advisory experience.
- We **FACILITATE** on average 5 Insurance Claims per month for clients.
- Our aim is to be a genuine value-add for **YOUR** model.
- As a small business owner we also **IDENTIFY** with other small business owners and understand their unique needs.
- We aspire for **OPERATIONAL EXCELLENCE** balanced with a friendly and caring service.
- We have the right **CHOICES** of Insurance & Legal Solutions to meet both your clients' needs & budget.
- Finally, we **CARE** about you and your clients.