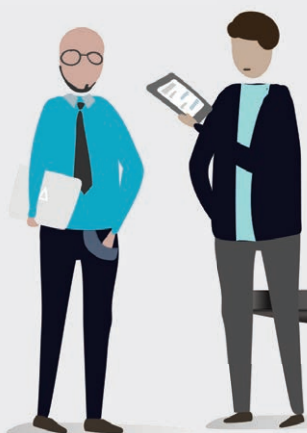


A comprehensive Estate Planning Service. Online. **Accountants & Advisers**

Would you like to offer comprehensive estate planning services to your clients, without the expense or delay of engaging external lawyers?
PaxAnimi is for you.



PaxAnimi[®]
estate planning

PaxAnimi. Peace of mind.

White label service

You can offer PaxAnimi as a 'white-labelled' estate planning service – meaning that you can promote PaxAnimi to your clients under your own banner and as your own, in-house estate planning service that is fully supported by independent external lawyers.



Why is PaxAnimi different?

Comprehensive, easy & efficient estate planning at the click of a button.

PaxAnimi's innovative Screening Tool goes far beyond a 'kit will' or standard online will to deliver a comprehensive, online estate planning service that replaces the costly and time consuming process of traditional estate planning via a law firm.

With 30 years of experience in helping people to do effective estate planning, PaxAnimi's legal team has found that many people want very similar things from their estate planning, and so the PaxAnimi Screening Tool was created.

The easy to use, yet comprehensive Screening Tool can be completed online, by you or your clients anytime, anywhere.

If your client fits the profile*, their comprehensive estate planning documents will be created and be available for viewing after completion.

PaxAnimi:



Is a fixed-fee service that costs the end-user less than half of many traditional estate planning services, providing superior value for a comparable service.



Is a complete, online estate planning advisory service that provides the same outcome as if you were dealing with an experienced estate planning lawyer.



Is supported by experienced estate planning lawyers to deliver maximum taxation and risk protection benefits to your client, their family and beneficiaries.

It's that simple.

You determine the total cost to your client, including your administration fee plus \$1,359 + GST for each client that completes the process.

How does PaxAnimi's Online Estate planning Service work?

You or your client access PaxAnimi's online Screening Tool 24/7, where the user will be guided through the step-by-step, easy-to-use full advisory service*.

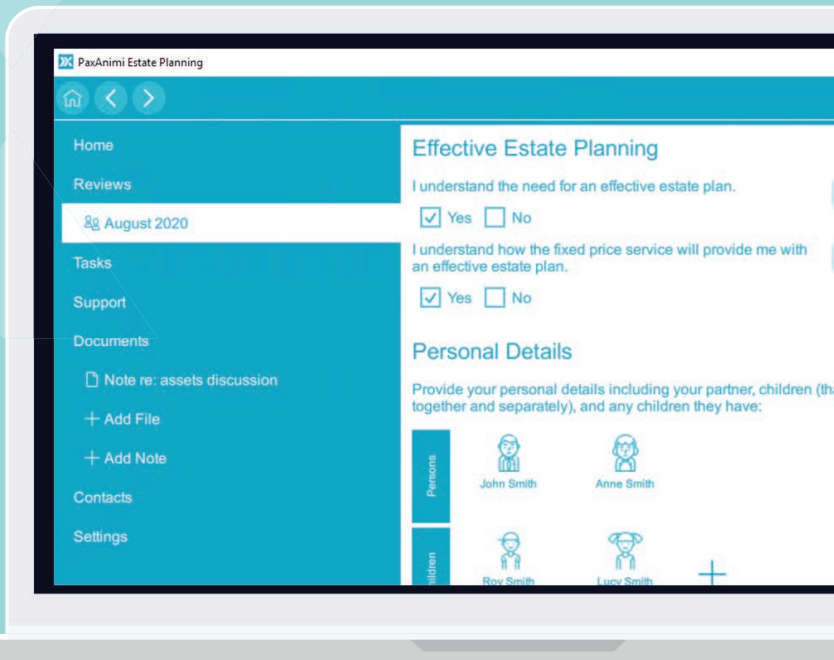
1. If your client fits the profile in the Screening Tool (and most people do), they will receive their personalised estate planning documents online, including:

- Enduring power of attorney
- Guardianship appointment
- A comprehensive will with optional testamentary trusts (that allow for a choice of a flexible and two capital protected trusts)
- A complete estate planning report outlining what your client has done and why, providing a point of reflection for future review, giving peace of mind and saving time and cost
- A housekeeping outline is included in the report, telling your client what they need to do to get their personal and financial circumstances to align with their estate planning in the most effective way

2. Both you and your client can access the unsigned documents without charge, anywhere, anytime from PaxAnimi's secure website or Apple or Android app

3. You determine your administration fee and you pay PaxAnimi just \$1,359 + GST for each client who completes the process (a husband or wife or partners are charged only the one fee)

All educational, marketing and legal documents are provided as part of PaxAnimi's comprehensive Estate Planning Service.



Why choose to partner with PaxAnimi?

Your clients trust you with their financial future. PaxAnimi can assist in providing your clients added peace of mind in knowing their assets will also pass tax effectively and with reduced risk when the time comes.

We know that planning for the best personal and financial outcomes for your clients is at the core of what you do.

Now you can partner with PaxAnimi to offer a comprehensive estate planning service, ensuring your clients' financial stability and success in life, and in legacy.

PaxAnimi can help deliver the best outcome for your clients

A comprehensive and tailored approach | More than just a set of documents, PaxAnimi provides the same customised, high-quality outcome as traditional face-to-face estate planning

No repeat meetings with a lawyer | PaxAnimi removes the need for repeat face-to-face meetings with a lawyer, saving valuable time and money

Speed and convenience | PaxAnimi's Screening Tool can take just 30-45 minutes to complete and is done online, anywhere, any time and at your clients own pace

Access, anytime | Online access to the unsigned estate planning documents anytime, without charge

No subscription fees or Upfront costs | The Screening Tool can be accessed free of charge - your clients only pay if they fit the Screening Tool criteria and choose to place an order to receive their completed estate planning documents

Key benefits



Fast turnaround

Speed up the completion and delivery of your clients' estate planning documents



Value-added service offering

Add a new revenue stream, and a value-added service to your clients, without increasing overhead



Full service

Speed up the completion and delivery of your clients' estate planning documents



White label

You have the option to white label under your own business name



Online access

Online access to all your clients' historic and current estate planning decisions and unsigned documents



Simple fee structure

No subscription fees or upfront costs



Credibility building



No payment until your client fits the Screening Tool profile and places an order.



30 years' estate planning experience.



Secure Cloud Offering, Enterprise Product Authentication and Data Encryption at rest and in transit.

Offering your clients effective estate planning means offering them ultimate peace of mind. Make sure your clients are personally and financially protected in life, and in legacy – partner with PaxAnimi today.

Contact us

Phone 02 8915 4915
enquiry@paxanimi.com.au
paxanimi.com.au

PaxAnimi
estate planning

* Terms and Conditions apply, please see www.paxanimi.com.au for details.