

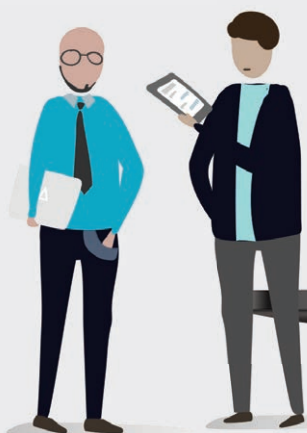
Effective estate planning. An employee benefit.

PaxAnimi - peace of mind for your employees.

Effective estate planning is too important to be left until retirement.

You can now offer estate planning as an employee benefit, providing your team with a practical solution for an important task that is usually left in the 'too hard' basket, or is neglected altogether.

With PaxAnimi's easy to use, online Screening Tool, you can incentivise both new recruits and long-serving team members with a valuable gift that will benefit them and their families for years to come.



PaxAnimi[®]
estate planning

PaxAnimi. Peace of mind.

As an employer, you strive to provide your employees with a work environment and compensation package that both rewards and assists them to maintain mental health and provide for their families. You may already offer your employees health and lifestyle benefits. But have you considered offering them long-range benefits that will give them peace of mind throughout their life, and provide financial security for their families when they are gone?

With PaxAnimi, you can now offer your employees effective estate planning. At a price of less than half the cost of traditional estate planning, PaxAnimi delivers tax effective outcomes and flexible opportunities that protect against the risks of passing wealth on death. Partner with PaxAnimi and incentivise your employees with a long-range, effective estate planning outcome.



Why is estate planning important for your employees?

Often people don't think about the importance of estate planning until it's too late.

Accidents can, and sadly do happen. So effective estate planning is not just for the retired or the elderly.

As an employer, you can now offer your employees peace of mind that this important need has been dealt with.

Everyone should have an effective estate plan in place that protects them, their family that they leave behind and their wealth.

Effective estate planning will deliver your employees peace of mind and protection by:



helping them to make informed decisions about the 5 stages, 7 rules and 7 risks of effective estate planning



determining who is to manage their assets and what is to happen with their personal care if they lose mental capacity



putting in place the best options for their beneficiaries for when they die, including about the management of taxation outcomes and protection against the 7 risks of passing wealth on death

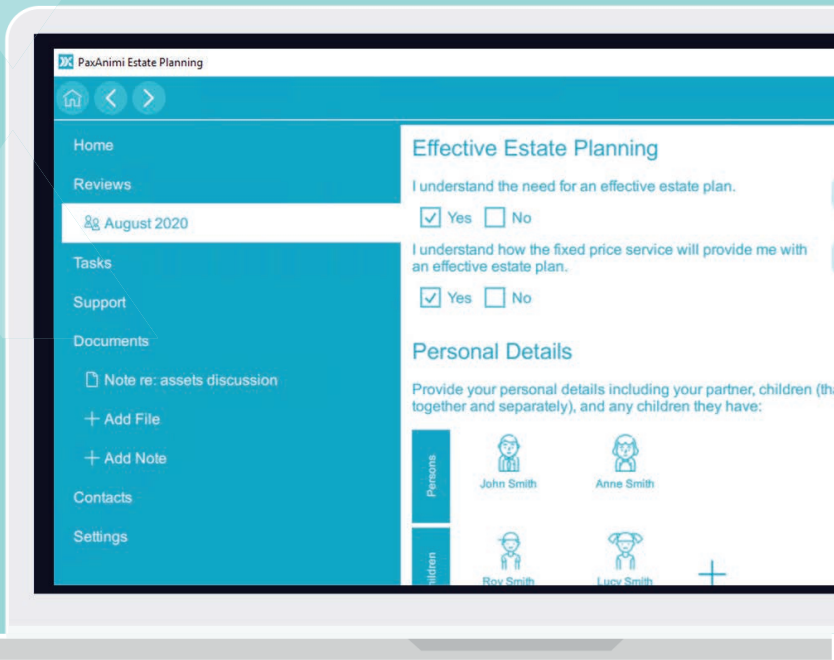
PaxAnimi does this for your employees

PaxAnimi uses its innovative **Screening Tool** to deliver far more than a kit will or a standard online will. PaxAnimi's estate planning service uses optional testamentary trusts as part of its standard estate planning outcome. Your employees will then have ongoing access to their estate planning outcomes on their PaxAnimi app. It's a valuable, cost-effective, long-range solution.

How does PaxAnimi's online estate planning service work?

Your trusted adviser will provide you with access to PaxAnimi's online Screening Tool which you can access 24/7. There's no need to answer a lengthy Q&A or provide detailed personal or financial information. You will be guided through the step-by-step, easy-to-use, full advisory service.

1. If you fit the profile in the Screening Tool (and most people do), you will receive your 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 2 capital protected trusts)
 - ✓ A complete estate planning report outlining what you have done and why, so that you have a point of reflection for future review, giving peace of mind and saving time and money
 - ✓ A housekeeping outline is included in the report advising what you need to do to get your personal and financial circumstances to align with your estate planning in the most effective way
2. You can access your documents without charge anywhere, anytime, using PaxAnimi's secure website or app
3. Unless your personal circumstances change into the future, your estate planning is done



How can PaxAnimi benefit you?

PaxAnimi can help you plan for the best outcome for you and your family:

A comprehensive and effective 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 own pace

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

No upfront costs or subscription fees | PaxAnimi's service can be accessed free of charge. You only pay if you fit the Screening Tool profile and choose to place an order to receive your completed estate planning documents

PaxAnimi delivers:



A fixed-fee outcome that costs less than half of many traditional estate planning services, delivering superior value for a comparable set of estate planning documents



An online service that is supported by experienced estate planning lawyers, delivering the same effective outcome as if you were sitting across the table in an estate planning lawyer's office



Delivers maximum taxation and risk protection benefits to your family and beneficiaries

Why is PaxAnimi different?

Easy & effective estate planning at the click of a button.

PaxAnimi's innovative Screening Tool goes far beyond a 'kit will' or standard online will, delivering an effective, online estate planning service that replaces the costly and time consuming process of traditional estate planning. Completed online in the comfort of your own home or with your trusted adviser, there is now no need for expensive Q&A's and face-to-face meetings with an estate planning lawyer.

With over 30 years of experience in helping people to do effective estate planning, PaxAnimi's legal team found that most 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 delivers a full estate planning outcome, ensuring you receive the **tax benefits** and **risk protections** available from effective estate planning.

PaxAnimi will save you time and money, while giving you the peace of mind of an effective estate planning service not available from a "kit will" or a standard online will.

Finally! PaxAnimi provides an easy, innovative way to complete your effective estate planning, online, ensuring your wealth is dealt with in the way you want if you lose your mental capacity and when you die.

Completed online and in your own time

Simply complete PaxAnimi's online Screening Tool. If you fit the profile your estate planning documents will be created and delivered to you online.

It's that simple.



PaxAnimi



No payment until you fit the Screening Tool profile and place an order



30 years' estate planning experience



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

Take your estate planning out of the 'too-hard basket'.

Ask your trusted adviser to contact PaxAnimi today and you can be personally and financially protected in life, and in legacy. The ultimate peace of mind.

Contact us

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