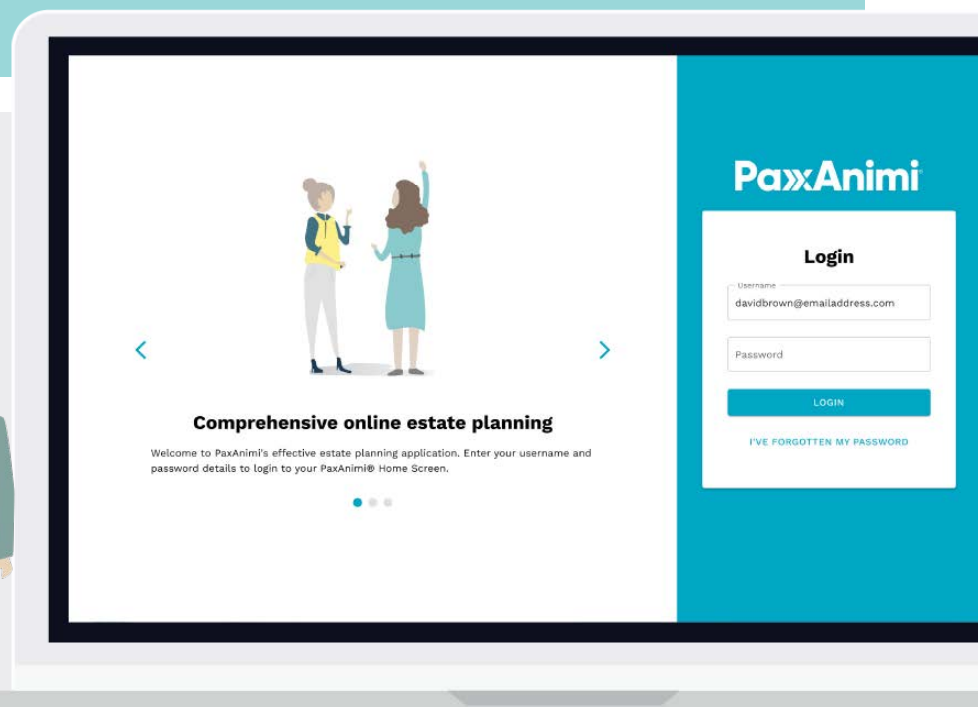


A comprehensive estate planning service. Online. **Accountants & Advisers**

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



PaxAnimi's online estate planning service allows you to offer a cost-effective solution that will improve your bottom line, without needing to engage in repeat face to face meetings with a lawyer.

If helping your clients to plan for their future is the cornerstone of your business, PaxAnimi® can provide the opportunity for them to also be personally and financially protected on loss of capacity and death.

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 & effective 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 an effective, online estate planning service that replaces the costly and time consuming process of traditional estate planning via lawyers.

With 35 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 can be completed online, by you or your clients anytime, anywhere.

If your client fits a Screening Tool profile*, their comprehensive estate planning documents will be created and be available for viewing online.

PaxAnimi®:



Is an effective, online estate planning service that provides a similar outcome as if you were dealing with an experienced estate planning lawyer.



Is supported by experienced estate planning lawyers to deliver the opportunity for maximum taxation and risk protection benefits to your clients, their families and beneficiaries.



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.

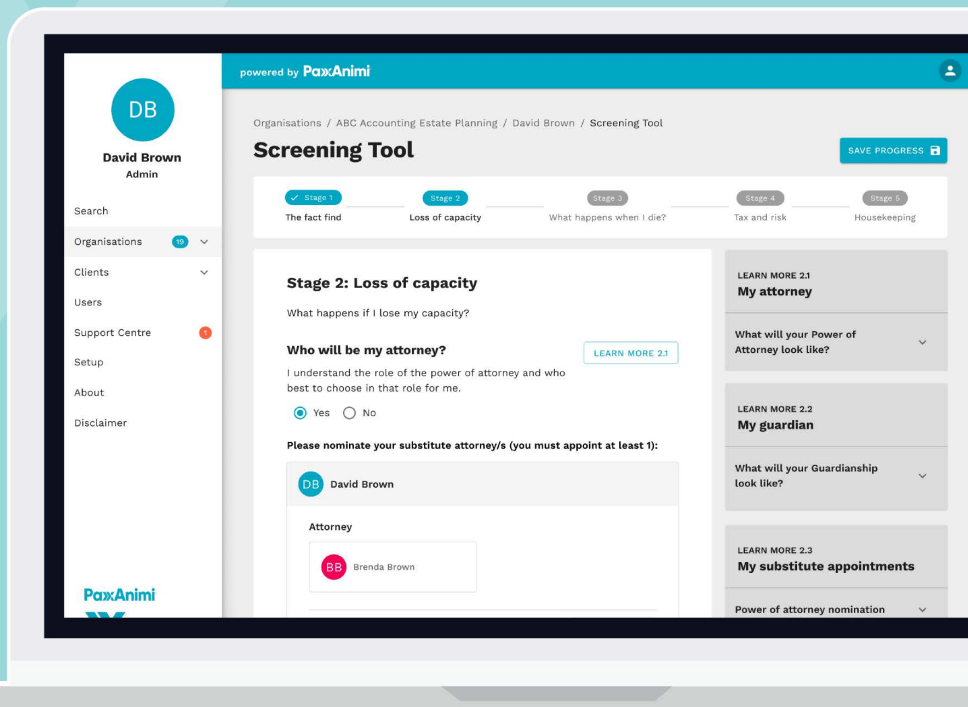
It's that simple.

How does PaxAnimi's online estate planning service work?

You or your clients 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 a 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)
 - If you choose a Standard service, 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
 - If you choose a Standard service, a housekeeping outline is included in the report, advising 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 clients can access the unsigned documents without charge, anywhere, anytime from PaxAnimi's secure website
3. You determine your administration fee and pay just \$1,715 GST inclusive for each client that completes the process (a husband or wife or partners are charged only the one fee)

Educational materials 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 with the opportunity for tax benefits and reduced risk when the time comes.

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

Now you can partner with PaxAnimi® to offer an effective estate planning service, assisting to provide clients with financial stability in life, and in legacy.

PaxAnimi® can deliver the outcome your clients want

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

No repeat meetings with a lawyer | PaxAnimi® can remove 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 30-60 minutes to complete and is done online, anywhere, any time and at your client's own pace

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

No subscription fees or upfront costs | PaxAnimi's service can be accessed free of charge. Your clients only pay if they fit the Screening Tool profile 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

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



Full service

Offer effective, full service estate planning, without compromising on quality



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 documents



Simple fee structure

No subscription fees or upfront costs



Credibility building



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



35 years estate planning experience



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

Providing your clients with effective estate planning means giving 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®
 Peace of mind.

* Terms and Conditions apply, please see www.paxanimi.com.au for details
 Liability limited by a Scheme approved under Professional Standards Legislation