

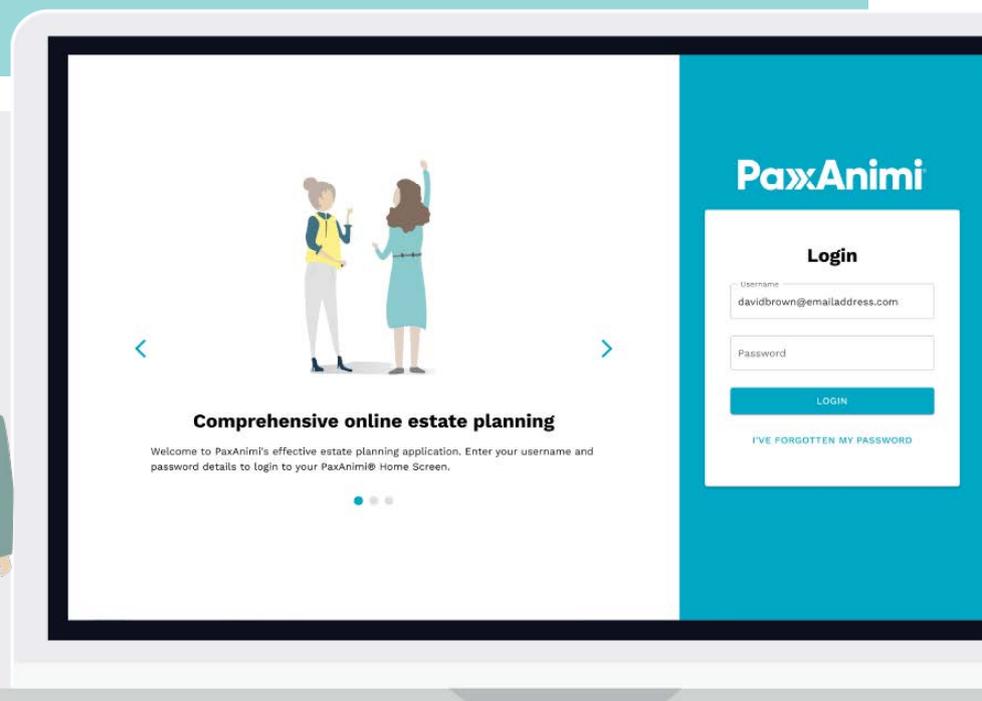
# Effective estate planning. An employee benefit.

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, effective estate planning outcome, 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®. Peace of Mind.

As an employer, you strive to provide your employees with a work environment and compensation package that rewards and assists them to maintain mental health.

But have you considered offering benefits that will give them peace of mind throughout their life, and provide for their families when they are gone?

With PaxAnimi<sup>®</sup>, you can now offer your employees effective estate planning, at a price of less than half the cost of traditional estate planning, for an equivalent outcome.

Partner with PaxAnimi<sup>®</sup>  
and incentivise your  
employees with an  
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<sup>®</sup> does this for your employees

PaxAnimi<sup>®</sup> 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<sup>®</sup> app. It's a valuable, cost-effective, long-range solution.

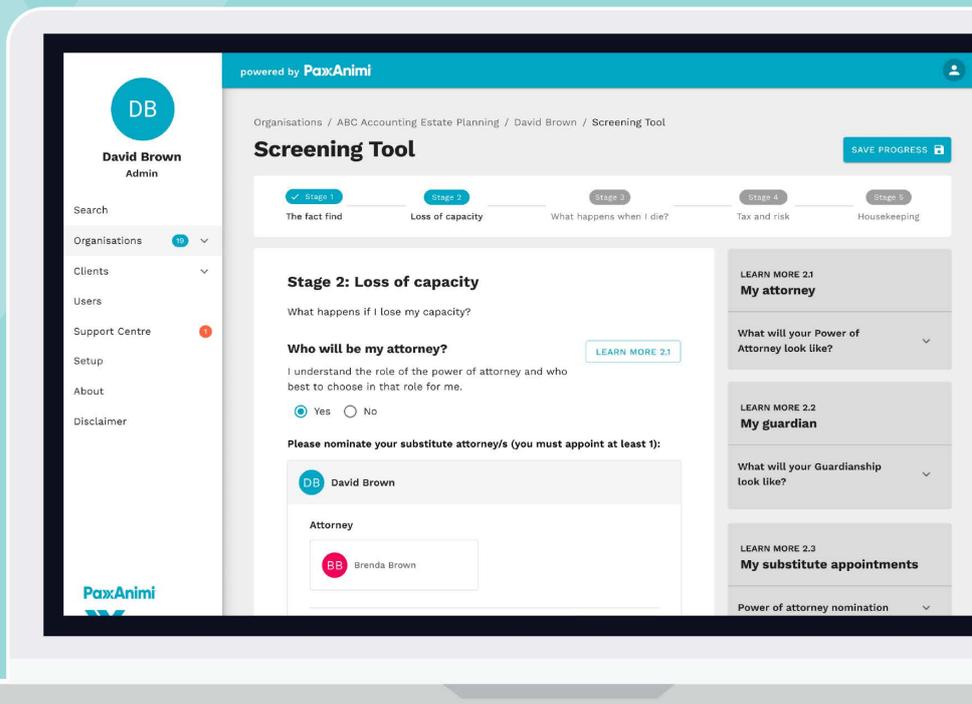
## PaxAnimi<sup>®</sup> will manage the service!

Your employee will be provided with secure, 24/7 access to PaxAnimi's online Screening Tool.

There's no need for them to answer lengthy Q&As or provide detailed personal or financial information. They will be guided through PaxAnimi's 5 Stages of effective estate planning. All the advice they need is included in the service.

### A straight forward service:

1. If they fit 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 2 capital protected trusts)
  - ✓ A complete estate planning report outlining what they have done and why, so that they 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 they need to do to get their personal and financial circumstances to align with their estate planning in the most effective way
2. Your employees can access their documents without charge anywhere, anytime, using PaxAnimi's secure website or app
3. Unless their personal circumstances change into the future, your employees estate planning is done



## How can PaxAnimi® benefit your employees?

PaxAnimi® can help your employees plan for the best outcome for their family, providing:

**A comprehensive and effective approach** | More than just a set of documents, PaxAnimi® provides the same customised, high-quality outcome as traditional 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 30-60 minutes to complete and is done online, any time and at your employees own pace

**Access, anytime** | Your employees have online access to their finalised estate planning documents anytime, without charge

**No upfront costs or subscription fees** | PaxAnimi's service can be accessed free of charge. A fee commitment only applies if your employee fits the Screening Tool profile and chooses to place an order to receive their completed estate planning documents

### Partnering with PaxAnimi® delivers:



A fixed-fee service per employee, costing less than half of many traditional estate planning services, providing superior value for a comparable set of estate planning documents



PaxAnimi's online services is supported by experienced estate planning lawyers, delivering the same effective outcome as if your employees were sitting across the desk from an estate planning lawyer



The opportunity for maximum taxation and risk protection benefits to your employee's family and beneficiaries, ensuring your employees will be grateful to your organisation for providing the framework to assist them in taking care of this important task before it's too late

## Why is PaxAnimi® different?

Easy & effective estate planning online.

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 employee's own home or with their trusted adviser, there is now no need for expensive Q&A's and face to face meetings with an estate planning lawyer.

With over 35 years of experience in helping people to do effective estate planning, PaxAnimi's legal team has created its innovative and unique Screening Tool. The Screening Tool guides will makers through PaxAnimi's effective estate planning process, effortlessly assisting them to screen themselves into an agreed, standard outcome.

The easy to use, advice-led Screening Tool delivers a comprehensive set of estate planning documents, ensuring will makers receive the the opportunity for tax benefits and risk protections available from PaxAnimi's effective estate planning service.

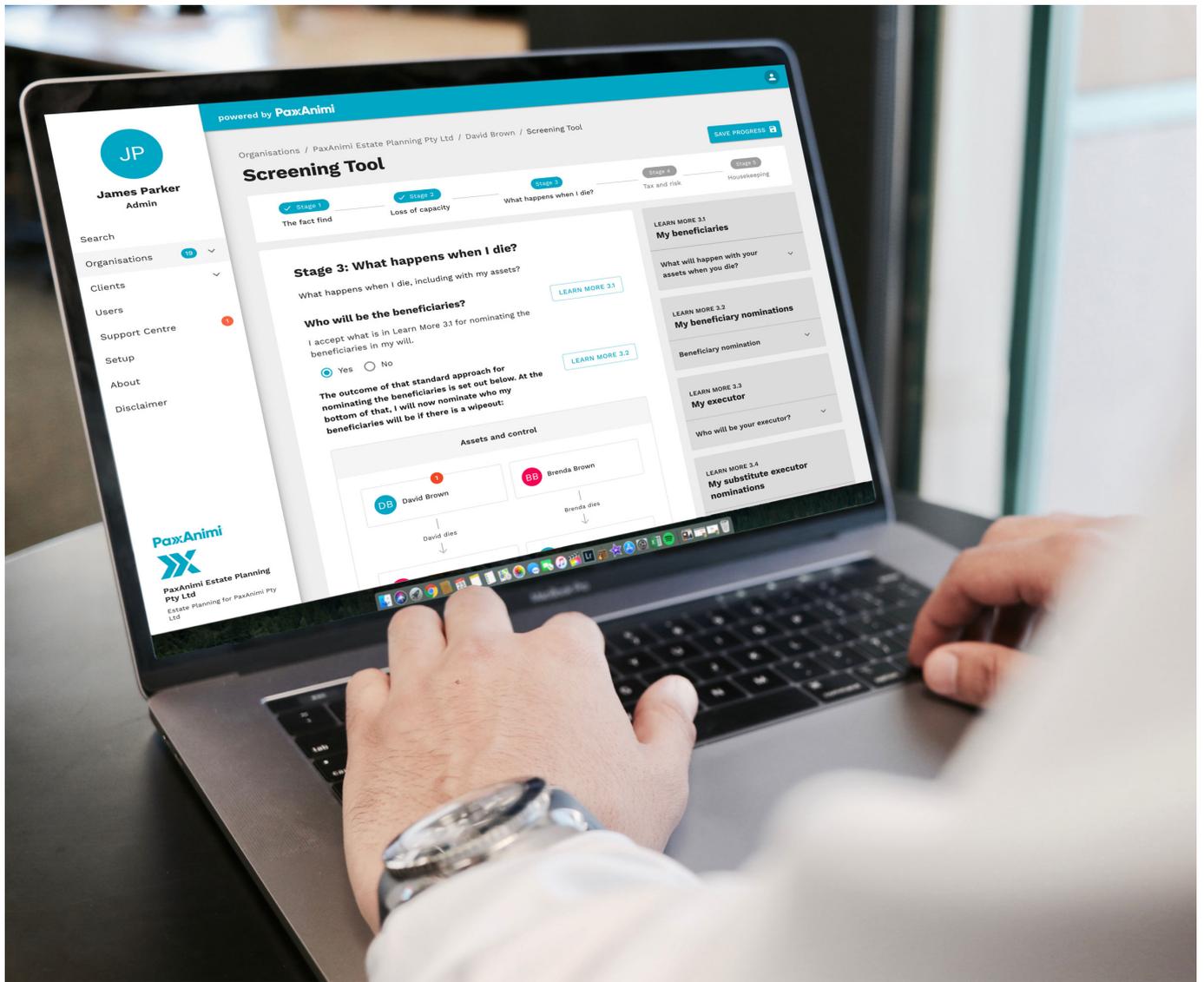
PaxAnimi® will deliver long-term value to each employee, ensuring this essential task has been dealt with before it's too late, saving them time, protecting their wealth and giving them and their families the peace of mind of knowing their effective estate planning is in place.

**It's the complex made simple!** PaxAnimi® provides a cost effective, innovative and easy to use estate planning service that employers can gift to their employees. Effective estate planning is too often neglected or not given attention to. Now employers can assist their employees in ensuring their wealth is dealt with and their families are protected when they are no longer here to take care of them.

### Completed online in your employee's own time

Your employees simply complete PaxAnimi's online Screening Tool. If they fit the profile in it their estate planning documents will be created and delivered to them instantly, online.

**It's that simple.**



**PaxAnimi®**



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



35 years' estate planning experience



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

**Estate planning should not be left to retirement.**

Partner with PaxAnimi® and gift your employees and their families long-term peace of mind for many years to come.

Now, and into the future.

[Contact us](#)

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**PaxAnimi®**  
 estate planning

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