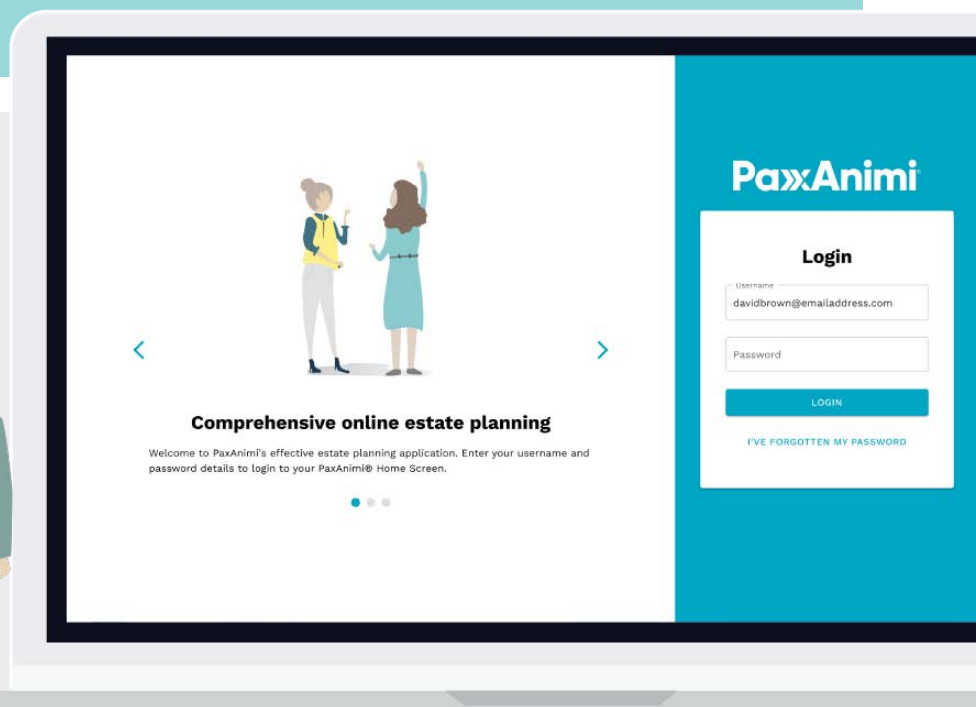


# A comprehensive estate planning service. Online. **Lawyers**

Are you interested in scaling-up your estate planning services without increasing costs or compromising on quality?

PaxAnimi<sup>®</sup> is for you.



An effective, full-service estate planning platform and workflow tool.

PaxAnimi® systemises your processes so you can offer the highest standards of estate planning, whilst reducing the stresses of finding the right solution and supervising the process for each of your clients.

### White label service

You can offer PaxAnimi® as a 'white-labelled' estate planning service – meaning that you can use PaxAnimi's full platform, under your own banner, to promote and manage a comprehensive, estate planning service. Online.



## Why is PaxAnimi® different?

Comprehensive, easy & effective estate planning, online.

Completed online by either you or your client, PaxAnimi's powerful workflow tools streamline your estate planning services, taking the time and expense out of working with your clients to plan for their loss of capacity and death.

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. As a result, it created its innovative Screening Tool to avoid legal professionals needing to reinvent the wheel with each new client.

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

#### PaxAnimi®:



Is a comprehensive estate planning service, providing a similar outcome as if you were doing it yourself.



Delivers the opportunity for maximum taxation and risk protection benefits to your clients' families and beneficiaries.



Provides an online workflow tool to help you manage all of your clients' estate planning needs, delivering a historic record of their planning decisions and documents.

**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 estate planning service\*.

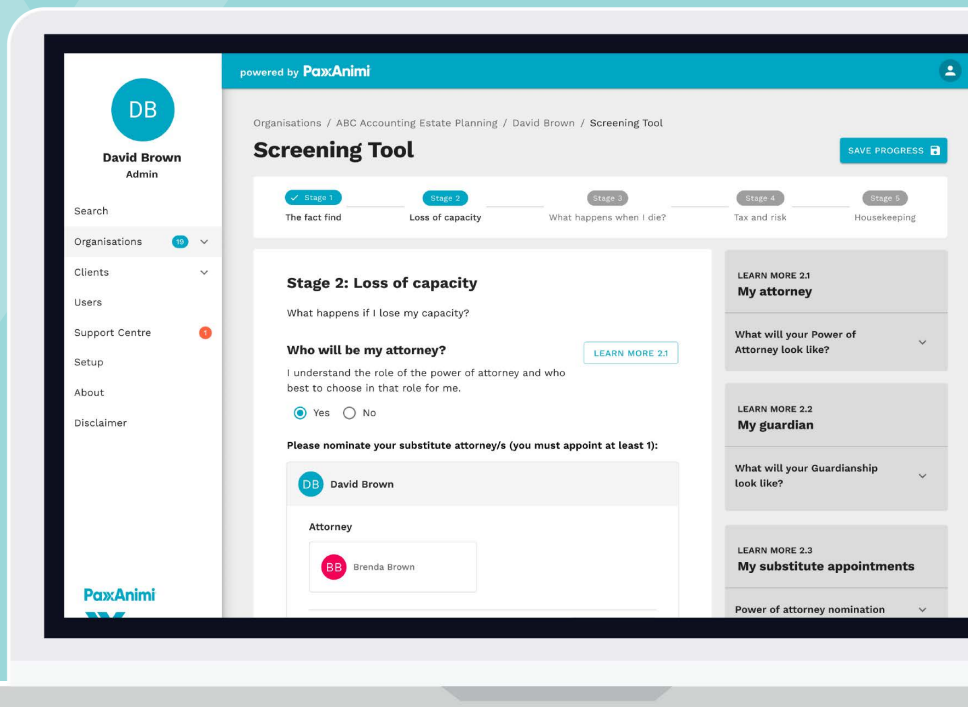
1. If your client fits a profile in the Screening Tool (and most people do)\*, they will receive their personalised estate planning documents online, including:

- 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 the 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 the 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 client can access the unsigned documents without charge, anywhere, anytime from PaxAnimi's secure website

3. You determine your professional fee and pay \$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®?

Partnering with PaxAnimi's online estate planning service means reducing the stresses of finding the right solutions and supervising the process for each new client's estate planning.

PaxAnimi's powerful workflow tools can create\*, manage and record each client's estate planning documents and decisions, helping you streamline your firm's estate planning processes.

### 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 if your firm was managing the process

**No repeat meetings** | Remove the need for repeat face to face meetings, saving valuable time and money

**Speed and convenience** | The PaxAnimi® Screening Tool can take just 30-60 minutes to complete and can be done online, anywhere, any time and at your clients' 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



### Speed of delivery

Speed up the delivery of your estate planning service using PaxAnimi's powerful workflow tool



### Value-added service

Deliver full-service estate planning at scale, enhancing revenues without increasing overhead



### Reduce stress

Remove the stresses of finding the right estate planning solution and supervising the process for each client



### White label

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



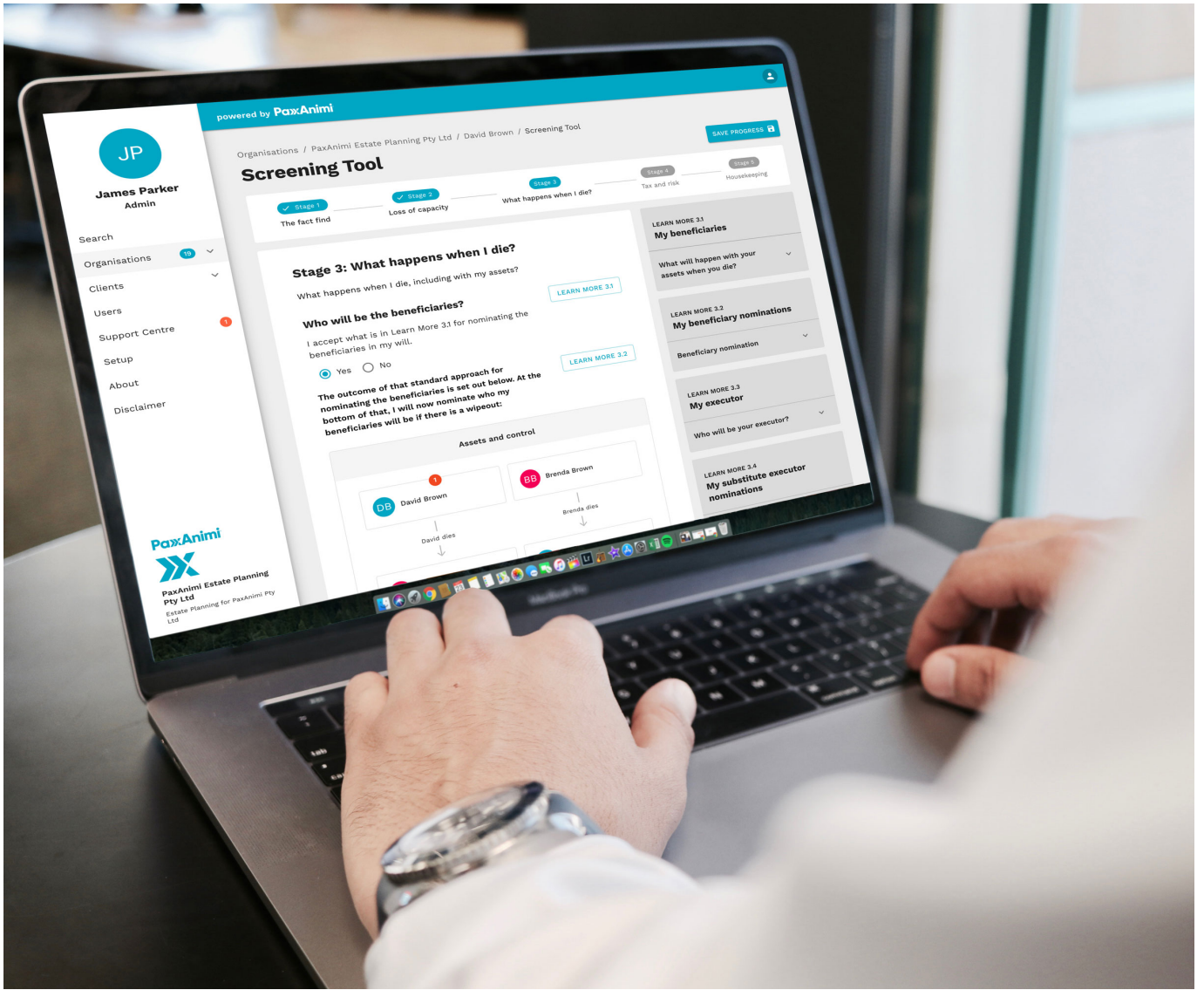
### Online access

Online access to all of your clients' historic and current estate planning 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

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 enquiry@paxanimi.com.au  
 paxanimi.com.au

**PaxAnimi®**  
 Peace of mind.

\* Terms and Conditions apply, please see [www.paxanimi.com.au](http://www.paxanimi.com.au) for details  
 Liability limited by a Scheme approved under Professional Standards Legislation