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Estate Services— advice driven collaboration

March 2008



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Presented by:

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Estate Services – advice driven collaboration

Presented by:

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and Guy Thornycroft, Prestwood Australia

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Unpacking our role

<i>Client type</i>	<i>Dispute Services</i>	<i>Collaborative Services</i>	<i>Transactional services</i>
Private Client			
Commercial Client			
Not for profit client			



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- advice and management services
 - assistance with analysis and interpretation of legal and factual issues
 - assistance with the planning and management of a client's affairs

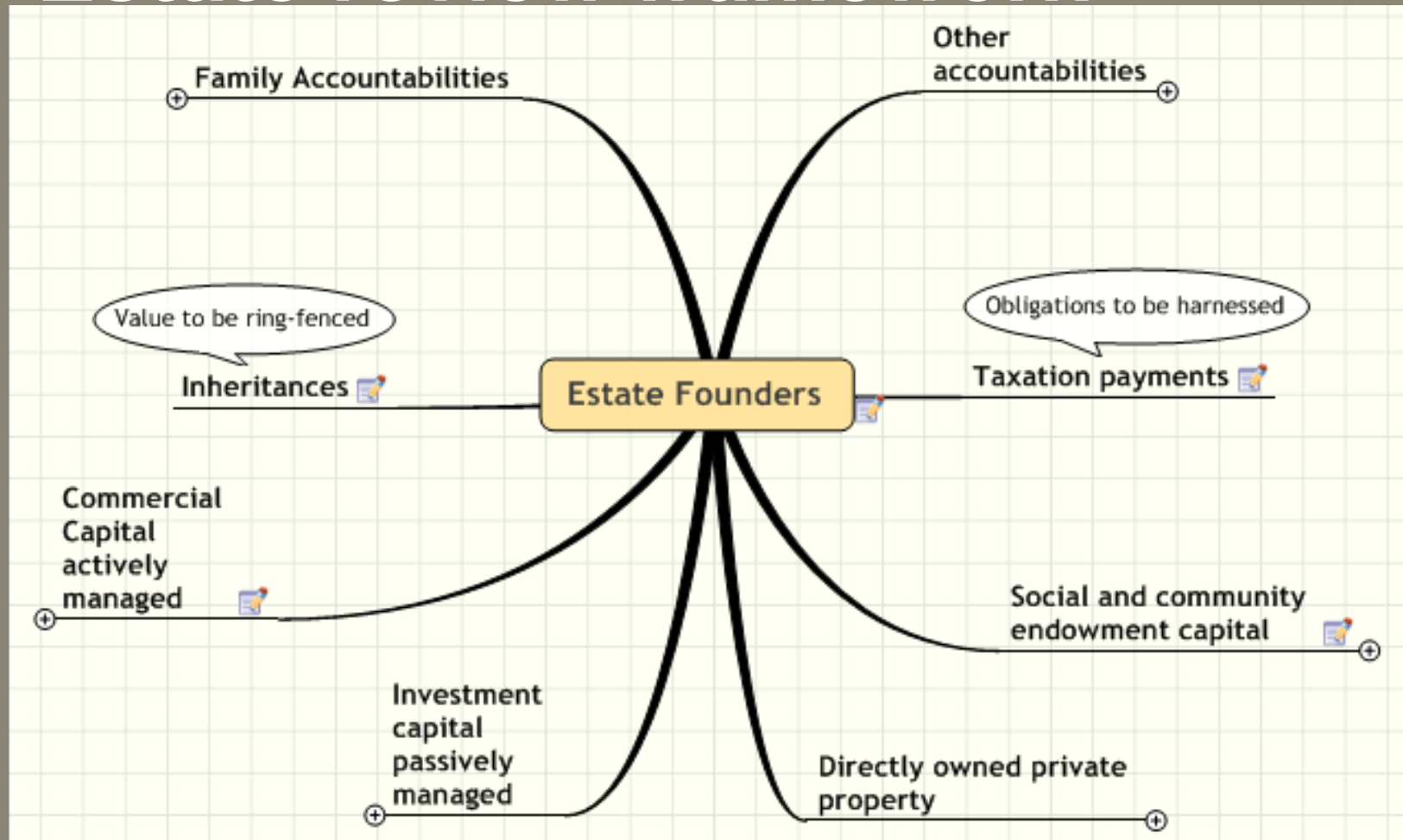


What job are you asking for?

- advice and management services
 - assistance with analysis and interpretation of legal and factual issues
 - assistance with the planning and management of a client's affairs
- transaction execution
 - assistance with the enforcement of legal rights and obligations including ownership of property
 - assistance with the authentication and assurance of title to property of any type



Estate review framework





Making this work

1 Strategic overview
and advice

2 Plan to implement
strategy

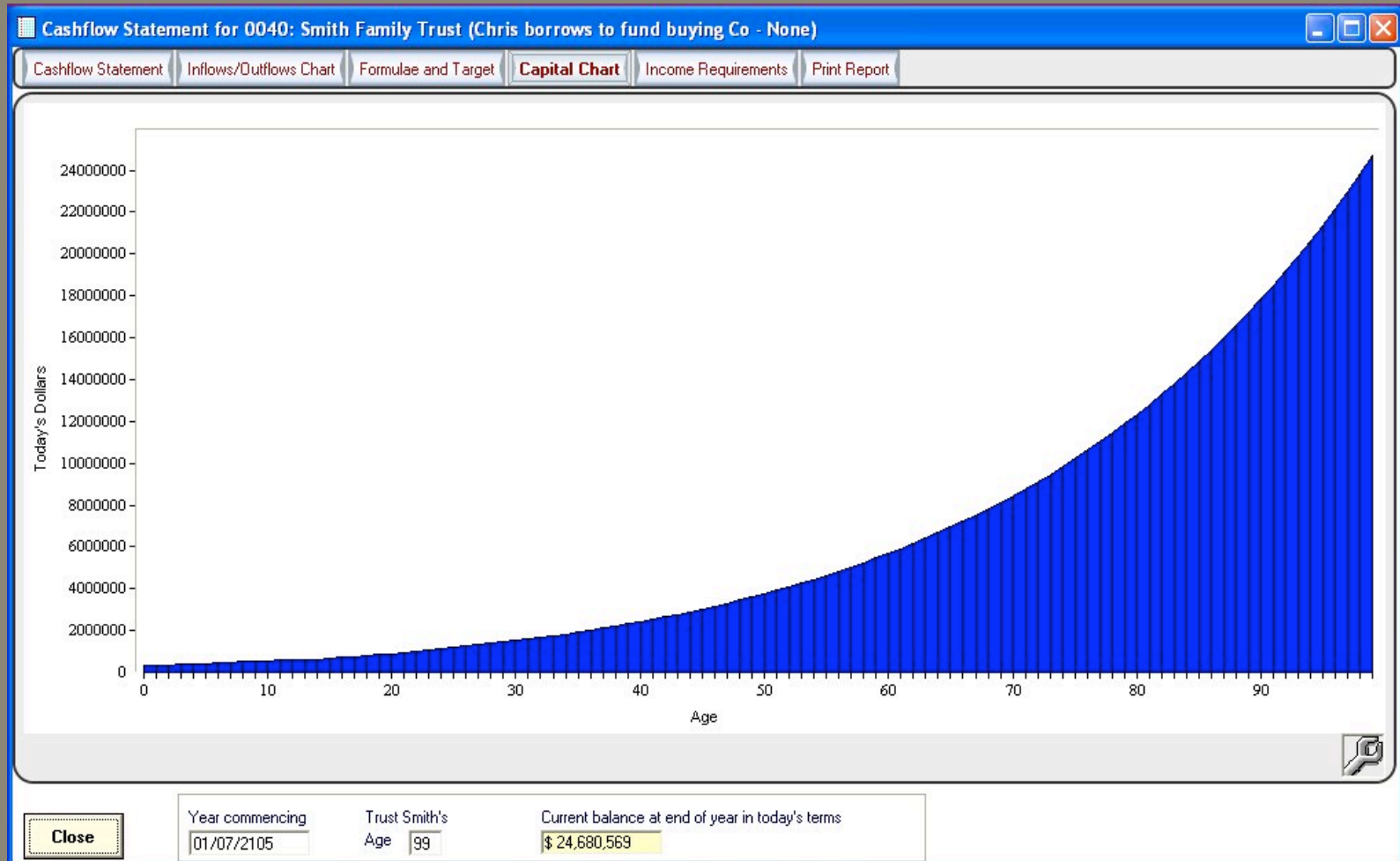
3 Transactions to
operate strategy

4 Support and review





Preferred option? – Family Trust - cashflow





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Bust silos to deliver client centred service



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- **Manage your clients**



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- Have a **common view** of the work and client with other advisers involved with the engagement



Bust silos to deliver client centred service

- **Manage your clients**
- Have a **common view** of the work and client with other advisers involved with the engagement
- Focus your advice on helping your client **make decisions** about issues or objectives they define.