

LECTURE 4 - DETAILS OF PACKAGES OF THE ONLINE LEARNING FOR “THE 7 STEPS TO SUCCESS TO IMPLEMENT VIEW’S TURN-KEY ADVISER FACILITATED ESTATE PLANNING PLATFORM”

For all packages, there are inclusions that reference View’s Adviser Facilitated Estate Planning scoping and pricing table. See [here](#) (please note that you will need to be logged in to the website to view this page).

Turn-key package features	Concierge	Comprehensive	Compliance
Access to strategy paper	●	●	●
All appendixes to strategy paper, including all additional material mentioned in strategy paper (including videos, diagrams, flyers)	●	●	●
Access to Zoom recording answering key initial questions	●	●	●
90 minute tailored Zoom meeting within the next 3 months			●
Compliance level estate planning solution (couple, 1 TT) from the Adviser Facilitated Estate Planning scoping and pricing table			●
Latest edition of ebook ‘Inside Stories’, with over 18,000 words of adviser centric estate planning related content			●
2 x 60 minute Zoom meetings over the next 4 months		●	
Comprehensive level estate planning solution (couple, 1 TT) from the Adviser Facilitated Estate Planning scoping and pricing table		●	
Any 2 paperback books published by View		●	
2 x 90 minute Zoom meetings over the next 6 months	●		
Any 5 paperback books published by View	●		
Concierge level estate planning solution (couple, 1 TT) from the Adviser Facilitated Estate Planning scoping and pricing table	●		
Service guaranteed fixed price (GST Inclusive)	<u>\$4,999</u>	<u>\$1,980</u>	<u>\$1,250</u>