

LECTURE 2 - THE HOW

View has developed a comprehensive framework to ensure all advisers can embed facilitated estate planning into their business.

There are 3 broad estate planning avenues View has developed for advisers.

1. Free Review Service

The free review service is, as the branding suggests free.

Any adviser, at any time and as often as they choose can provide View the material set out at [Appendix 1](#). The team at View will review this material and provide an obligation free recommendation as to the best next steps including a guaranteed up-front fixed price for View to assist (where appropriate).

The mantra we encourage advisers to embrace with the free review service is 'when in doubt, flick it out'. In other words, if an adviser is unsure what avenue to select – simply submit a free review and leave it to View to give you the answer.

2. Traditional Referral Model

The traditional referral model is built around some of Australia's leading estate planning specialists, leveraging the tech platform View has built to provide bespoke estate planning solutions.

Generally this solution is accessed in one of 3 situations, namely:

- a. the customer circumstances are of a complexity that the wholesale platform is inappropriate;
- b. the customer, or their adviser, would prefer a customised approach; or
- c. the adviser does not wish to facilitate, or project manage, the estate planning process. Some reasons for this include not specialising in the area, having other priorities, not having experience in facilitation (despite otherwise having skills in estate planning) or choosing not to build a pricing model for facilitating.

3. Wholesale (business to business) Adviser facilitated platform

This approach leverages View's platform to allow financial planners, accountants, risk advisers and estate planning consultants to radically improve their estate planning offerings.

The platform (which is constantly iterated based on user feedback) leverages the learnings of the founder of what was widely acknowledged as Australia's first virtual law firm ('elawyer' founded by View's Matthew Burgess).

The platform combines the intellectual property developed in delivering legal solutions for the upper echelons of the Australian high net wealth community with proprietary technology. Learn more about the estate planning process at [Appendix 3](#).

The outcome for advisers is the ability to deliver customer centric estate planning solutions, that simultaneously create immediately profitable income streams for each adviser's business.