

# BECAUSE EVERYONE NEEDS A PLAN

Wherever life may take you, change is the only constant. Yet most people never formally update their plans when things change. More than half of Australians fail to adequately adjust their plans after changes or milestone events in their lives. Collins Hume Estate Planning is here to make that process simple and efficient.

## INTRODUCING COLLINS HUME ESTATE PLANNING

Knowing what we know about the importance of Estate Planning for every step-in life, we partner with Yodal and our trusted legal partner to facilitate a simple process for ensuring your wishes for the future are honoured. A once long and complex process is now timely, simple and streamlined.

The entire Estate Planning process is pulled together into the Yodal platform – from the initial client needs assessment and document recommendations, to the client questionnaire capturing your wishes, right through to the provision of template documents delivered directly to our trusted legal partner (or your own lawyer) for review and finalisation.

## OUR PROCESS



### Discuss your needs with us

Collins Hume Estate Planning engages with you to better understand your circumstances, needs and wishes.



### Document recommendation and quote

Based on your requirements, Collins Hume Estate Planning provides you with a list of recommendations and a quote.

- The quote is a fixed, flat fee (inclusive of the lawyer cost) to have your entire Estate Plan completed.



### Accept and payment

If you wish to proceed, your intent is confirmed through Collins Hume Estate Planning.

- Payment of the fixed fee is remitted.



### Data collection

Collins Hume Estate Planning coordinates any additional information or specific requests in Yodal, to ensure your wishes are accurately represented and honoured.



### Finalise with a lawyer

The matter is forwarded to our trusted legal partners to be reviewed.

- Your final Estate Planning documents are completed.
- Collins Hume Estate Planning engages with you to facilitate the final execution of your Estate Planning documents.

Collins  
Hume

yodal

TRUSTED  
LEGAL PARTNER

For more information on how we can help preserve your wealth, call 02 6686 3000 or mail@collinshume.com.au

**BECAUSE EVERYONE NEEDS A PLAN TO ENSURE THE RIGHT MONEY, IS IN THE RIGHT HANDS, AT THE RIGHT TIME.**

Collins  
Hume

ACCOUNTANTS  
BUSINESS ADVISERS