

TOPDOCS PROTECT

Full service and online Estate Planning solutions





Online Wills and Enduring Powers of Attorney

Our online Will and Enduring Powers of Attorney enable your clients to access quality estate planning documentation at very cost effective pricing.

Drafted by Topdocs Legal, our online Will caters for a wide range of personal circumstances and provides comprehensive inclusions you would only expect to see with full service documentation.

Our online Will has a defined scope, and our ordering process assesses your client's circumstances prior to them completing the form to ensure the Will is right for them.

To ensure your clients are protected during their lifetime, via Topdocs Protect you can also order a range of enduring powers of attorney and appointments of enduring guardian online, each drafted to comply with the respective state based requirements.



Full Service Estate Planning

For clients with more complex needs, through our legal panel headed by Topdocs Legal and The Legal Hub, Topdocs facilitates a comprehensive suite of full service advice and documentation services in relation to:

- > Wills and Testamentary Trusts
- > Enduring Powers of Attorney
- > Trust and Business Succession Planning
- > Corporate Structuring
- > SMSF Succession Planning

Our full service offering involves you, as the trusted advisor, acting as the facilitator of the process, ensuring you retain full control of your client without assuming any of the legal risk associated with the preparation of the documentation and advice.

With our services extending nationwide, no matter where you are, we can provide you with a comprehensive solution for your firm.

For advisers who don't offer Estate Planning, we highly recommend you offering to facilitate the product with Topdocs, it really cements the client relationship with the adviser, and clients see us as not only professional, but caring for their long term generational wealth transfer and overall interests.

Paul Moran
Principal, Moran Howlett Financial Planning - Melbourne, VIC



Adviser Training

Topdocs presents an intensive Estate Planning course that is CPD accredited (15 hours) and presented as a face to face one day intensive combined with a 7 hour online training module.

Designed specifically for financial planners, accountants and lawyers, this comprehensive course will provide you with the required knowledge to confidently facilitate estate planning for your clients, enabling you to communicate your understanding of their estate planning needs and to work with Topdocs Legal or other solicitors to provide estate planning services to your clients.

Following the completion of the course, you will be able to easily incorporate estate planning as a service to your clients, creating an additional revenue stream for your firm and enabling you to provide a holistic service offering to your clients.

Well run course with good interaction between attendees and presenter. Complex concepts well explained. Practical examples of past cases helped to understand the importance of how the structures of Trusts/Wills are set up.

Nicholas Gyngell
Certified Financial Planner, Financial Lifetime Strategies Pty Ltd - Melbourne, VIC



Client Engagement Tools

We work with you to promote estate planning as a service offering to your client base. As part of our service we can provide you with a range of branded marketing materials to drive engagement with your clients, encouraging them to contact you in relation to their estate planning needs.

Our range of marketing materials that are available free of charge include:

- > An editable client letter, directed to your clients, that outlines the reasons why estate planning is important for them;
- > An estate planning overview brochure; and
- > A questionnaire designed to encourage your clients to contact you regarding their estate planning needs.

These tools can be rebranded with your corporate colours, free of charge.



*From the most simple to the most complex matters
- we've got you covered*



TRUST DEED SUPPLIERS
SMSF ADVISER CATEGORY
CORE DATA



TRUST DEED SUPPLIER
SMSF ADVISER
FINALIST
CORE DATA



TRUST DEED SUPPLIER
SMSF MEMBER
FINALIST
CORE DATA