

IMPLEMENT YOUR COMPLETE TESTAMENTARY TRUST SERVICE OFFERING WITH

The Complete Testamentary Trust Solution

1. Solve the Practical

with
**The Works
Testamentary Trust
Precedent Package**
+
**Estate Planning
Pricing Toolkit**

2. Deepen Technical Expertise

with
the online course
**Testamentary Trusts:
The Essential Guide
for Australian
Lawyers**

3. Guided Support

with
**12 months
membership
in the
TT Precedents Club**

PRICE:

Pay Monthly
\$550 x 12

inc. GST

SAVE

Pay in Full
\$6,250

inc. GST

1. “THE WORKS” PRECEDENT PACKAGE

- ✓ Testamentary trust precedents covering the following scenarios:
 - ↳ Establishing one testamentary trust
 - ↳ Establishing two or more testamentary trusts
- ✓ Simple will precedent (without a testamentary trust)
- ✓ 3 Cover letters sending draft documentation, documentation for signing and after signed documents have been returned
- ✓ Powers to include in a financial power of attorney
- ✓ Letter of wishes template
- ✓ Estate planning instruction sheet for individual and couple client
- ✓ Meeting agenda templates for an initial strategy meeting, signing meeting and combined strategy and signing meeting
- ✓ File note templates for an initial strategy meeting, signing meeting and combined strategy and signing meeting
- ✓ Material review template
- ✓ Estate planning matter workflow checklist
- ✓ Discretionary trust review checklist
- ✓ Family tree, structure diagram and estate planning flowchart templates
- ✓ Estate planning last check and draft document review template
- ✓ Extensive video training library
- ✓ Flyer - Annual review checklist (white label)
- ✓ Flyer - Excluding Foreign Persons From Your TDT (white label)
- ✓ Flyer - Testamentary trusts (white label)

1. ESTATE PLANNING PRICING TOOLKIT

Estate Planning Price List		
Estate Planning Essentials		
	Just You	Couple
Will, attorney documents and superannuation nominations	\$1,100	\$1,500
Optional extras		
	Just You	Couple
Testamentary Trusts	\$2,200	\$3,500
Strategy advice and nominations for your SMSF	\$550	
Strategy advice for your family trust	\$550	
Extra advice meeting	\$1,600	
Choose this option if: <input type="checkbox"/> You have a former spouse, step-children or estranged children <input type="checkbox"/> You are leaving someone out of your will <input type="checkbox"/> You have overseas assets <input type="checkbox"/> A beneficiary lives overseas <input type="checkbox"/> A beneficiary has a disability or cannot be trusted to manage their inheritance		
Total Price (GST inclusive):	\$	

Questions to Ask Before Finalising Your Estate Planning Pricing

To price your services and solutions fairly, there are many factors that you need to consider in addition to your hourly rate and time commitment.

Here's a list of the 10 questions we recommend you ask yourself when determining your pricing for your estate planning services:

- 1 How many moving parts and complex issues are involved?
- 2 Are you offering customer experience items that add additional value e.g. meeting at their home, after hours communications, urgent delivery?
- 3 What would it cost to reach the same outcome if there was a family provision application or dispute after death?
- 4 What non-financial benefits are your services giving to your client and their beneficiaries e.g. peace of mind, easing anxiety?
- 5 Are you creating any tax savings for the beneficiaries e.g. minimising tax on superannuation death benefits, income tax savings from utilising a testamentary trust?
- 6 How many years of experience do you need to be able to solve the client's problem?
- 7 Did you need to purchase precedents, templates and training in order to provide this solution to the client?
- 8 What risks are you taking responsibility for that need to be factored into the price (e.g. the risk that you could be sued by a beneficiary in the future)?
- 9 What is the minimum price you can charge for this solution or service without losing money?
- 10 How does your pricing compare to alternative solutions available to the client?

✓ Over 15 pages of estate planning specific cost agreement clauses to protect your firm

✓ Executor remuneration and commission consent template

✓ Plug and play price list templates in Word and Canva

✓ Break-even price excel calculator

✓ Value pricing questionnaire

✓ 3 hours of pricing training

Estate Planning Price List		
Estate Planning Essentials	Testamentary Trusts Essentials	Protection Pack
Individual: \$1,100 Couple: \$1,500	Individual: \$3,300 Couple: \$4,000	Individual: \$5,000 Couple: \$5,600
Leave a legacy you will feel proud of with a: <ul style="list-style-type: none"> • Will • Attorney documents • Advanced health directive • Letter of wishes • Superannuation nominations 	Protect your family and get peace of mind with a: <ul style="list-style-type: none"> • Will • Testamentary trusts • Attorney documents • Advanced health directive • Letter of wishes • Superannuation nominations 	Have peace of mind that your loved ones will be protected with: <ul style="list-style-type: none"> • An extra strategy meeting • Will • Testamentary trusts • Attorney documents • Advanced health directive • Letter of wishes • Superannuation nominations • Strategy advice for your family trust • Strategy advice and nominations for your SMSF
<small>The small print</small> <ul style="list-style-type: none"> • All prices are GST inclusive and are valid for 90 days • If you need extra support, we will provide an upfront fixed price before doing any additional work 		

2. TESTAMENTARY TRUSTS: THE ESSENTIAL GUIDE FOR AUSTRALIAN LAWYERS

- ✓ 10 hour self paced online course
- ✓ Self assessed CPD Points (except for WA)
- ✓ Lifetime access
- ✓ Watch on demand via desktop or our app
- ✓ Practical checklists, client flyers and decision trees
- ✓ Technical knowlege with practical application

Get the complete roadmap on how to start recommending and preparing testamentary trusts with confidence and expertise



Phase 1:
Master the core principles



Phase 2:
Drafting guidance



Phase 3:
Strategies for common client demographics



Phase 4:
Get confident with client communication



Phase 5:
Start implementing

View the full course outline [here](#)

3. 12 MONTHS MEMBERSHIP IN THE TT PRECEDENTS CLUB

✓ 1 Lawyer + 1 Plus One Member

✓ Weekly Live Hot Seat Q&A every Thursday

✓ Clause drafting support

✓ Client strategy review

✓ Will drafting clause library

✓ Free precedent updates while a member

✓ Quarterly technical webinars

✓ Discounts on Art of Estate Planning precedents

✓ Be part of an Australian wide referral network

✓ Build connections and network with our private Facebook Group community

✓ Searchable database of previous weekly hot seats for problem solving estate planning issues

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