



## Information for financial planners

# Fiduciary services for families who provide for a family member with a disability.

## Working in partnership with you and your clients

At Australian Executor Trustees, we understand the responsibilities of caring for a family member with an intellectual, psychiatric or physical disability and the important role you play in helping your clients plan for their future.

By working in partnership with you, our aim is to help you protect their relative for the remainder of their lifetime in a co-ordinated and tax effective manner.

We can provide a comprehensive tailored solution that gives you access to professional advice and trustee services. It also ensures you continue to play an active role in the management of funds on behalf of your client and their family.

### About our services

First and foremost, our services are designed to give your clients peace of mind, knowing that, upon their death, everything is in place to maximise the wealth protection, lifestyle and care of their family's affairs.

It is a highly flexible and unique service that offers:

- family care, support and participation
- recognition of the expertise and valued relationship clients have with their own trusted financial, legal or tax advisers
- professional trustee services
- specialist estate planning resources
- access to superannuation solutions.

### How can our services help your clients and their family?

Every family's circumstances are different so we have designed the service to be as flexible as possible. You can choose the right level of service to meet your client's needs.

The service involves a detailed review of the client's circumstances and the formulation of a tailored plan that ensures their wishes are effectively reflected in:

- their estate planning
- their financial planning and wealth management
- the ongoing care required by the family member with the disability.

The plan is developed and reviewed in consultation with you, the family and key carers. It is reviewed at least annually or as and when the family's situation changes. This means you and your clients can take comfort in the knowledge that the plan will continue to develop so that the family member with a disability is appropriately cared for when your clients eventually pass away.

## Why choose us?

- We specialise in helping clients who have a family member with a disability.
- We have a strong focus on partnering with advisers to provide clients with the best possible outcomes – rather than competing with you for your clients.
- We are one of Australia's largest and most experienced trustee companies with over 130 years experience.
- We are recognised as industry leaders in estate planning and structuring.
- We have proven expertise in the administration of self-managed super fund options.

To find out more about how our disability trustee services can help you and your clients, please call your business development manager.

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