

# real consulting

SPECIALISTS IN

risk management • estate planning • business succession planning

## Why get real advice?

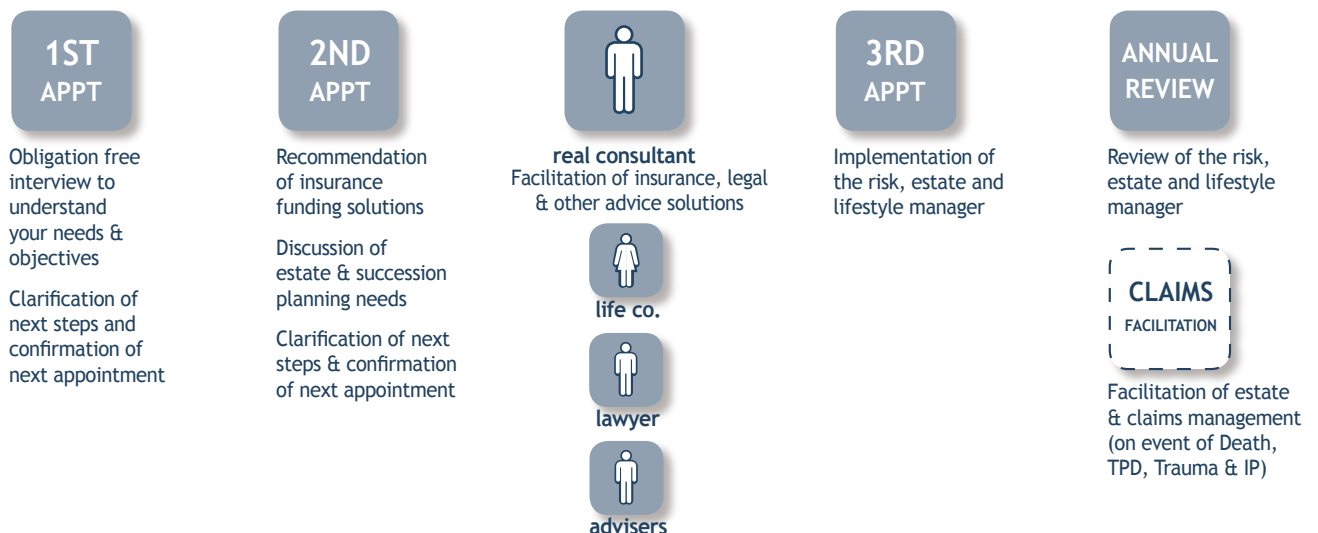
- Because without it the outcome for you, your family and your business could be disastrous.
- The most valuable asset you have, is YOU. Therefore the most important asset you should protect is YOURSELF.
- Because estate planning is more than just having a will, it's about the right people ending up with enough assets when they need it most.

People have different attitudes towards risk and many have not considered the potential impact serious illness/injury or death can cause their family and their business. (1) Consider that only 26% of adult Australians have adequate life insurance, over 655,000 Australians need some

form of self-care assistance every day and more than half do not have an effective will and power of attorney. (2) Add to this 1 in 3 men and 1 in 4 women in Australia will be diagnosed with Cancer before the age of 75 and you start to realise the importance of undergoing a review in this area.

## What is the real service?

real offers a obligation free initial meeting which provides a detailed overview of the service and a discussion of your needs and objectives as outlined in the diagram below.



# What is the **real** manager?

Not only do you receive a professional risk management service, but all clients are provided with their own risk estate and lifestyle (real) manager.

The **real** manager conveniently stores and tracks all of the important information relating to your risk, estate and business succession plan. This includes:



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## **risk manager**

*your risk management strategies and insurance policy documents*

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## **estate & succession manager**

*information on your estate and succession planning needs and relevant documents e.g.; wills and powers of attorney*

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## **lifestyle manager**

*your lifestyle plans and objectives e.g: a copy of your financial plan and other documents relating to your lifestyle goals*

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## **documents manager**

*a register of your important documents and their location e.g.; title deeds, trust deeds, birth certificates*

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## **relationship manager**

*who your key advisers are, bank details, etc which helps manage and maintain your families lifestyle*

In the event that something happens to you, the **real** manager will provide those who need to make decisions on your behalf, with all relevant information and documents including any instructions you have left to the guardians of

children or those in charge of your personal and/or business affairs. To arrange an initial obligation-free meeting please call our office or talk to your professional adviser.

## Who is **real**?

**real** consulting services was founded by a team of experienced professionals with a clear vision of making risk management and estate planning more attractive and available to the overwhelming majority of Australians who need it. Our business is based on providing clients with lifestyle

management and funding solutions.

We are specialists in what we do and have therefore limited our Australian Financial Services License to life risk insurance and superannuation. We do not provide advice on investments, taxation or legal strategies. **real solutions for real people.**

**For more information, please contact**



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