

# Trust Power: Empowering Powerful Advisors

Trust Power is a comprehensive solution designed to streamline client engagement and minimise risks for accountants when upgrading client discretionary trust deeds. It combines legal expertise from LY Legal with practical tools, a detailed legal review and report, client engagement letters and legal discretionary trust deed upgrade with NO resettlement.



# The Need for Trust Power

## The Courts are getting Tough

Your client may lose access to their discretionary trust with a replacement of the Trustee with a court appointed trustee.

## Upgrade Options

Standard Family Trust Election discretionary trust or Family Protection Trust for protecting family wealth for bloodline for generations to come

# The Trust Power Service

## Expert Review

A thorough examination of all trust deeds by our team looking for problems including change in trustees.

## Trust Report

Detailed findings from our review and trust upgrades to either standard FTE trust or Family Protection Trust including new appointors or Family Protection Appointors in a separate deed.



# Trust Power

1

## Engage Your Clients

Use our videos and also Grant Abbotts Family Wealth Protection book to highlight why ALL discretionary trust deeds need upgrading.

2

## Engage LY Legal

Contact the team - [nush@legalbackoffice.com.au](mailto:nush@legalbackoffice.com.au) for bulk pricing

3

## Deed and Documents Review

Find out where your client's problems are.

4

## Trust Deed and Appointor Deeds sent to you

Review the package and get your client in to sign the package.

5

## Invoicing

We invoice you and then you invoice the client with your mark up.



# Trust Power Pricing

**\$595**

Accountants Pricing - value \$1,250

**\$895**

Family Protection Trust - value \$2,250

**Bulk**

Contact us for Pricing