



Donaldson Walsh launches Estate Wise on-line support and advisory service

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Estate Wise, an internet-based service with on-the-ground support, has been launched in SA by creator Jeremy Duffy supported by Adelaide's Donaldson Walsh Lawyers.

Jeremy says South Australian financial planners and accountants now have a fast, cost-effective and secure alternative when it comes to helping clients meet their estate planning needs.

"Estate Wise provides the perfect balance between traditional estate planning service delivery and innovative, modern on-line tools," he says.

"It's rapid, more affordable and less intimidating, yet doesn't sacrifice the security that only expert, one-to-one legal consultation can provide."

He says advisers or their clients can enter and submit the relevant data at the secure Estate Wise website - www.estatewise.com.au - and draft estate planning documents are forwarded to the adviser and their clients within hours.

"Then they just arrange an appointment with a member of the Donaldson Walsh Wills, Estates & Business Succession team for one-to-one legal approval and execution of the documents."

Estate Wise also helps advisers strengthen their client relationships.

"It allows them to quickly address the estate planning needs created by any transactions their clients enter into from time to time with complete legal certainty, and you never know what other business opportunities or professional connections that might give rise to."

According to Jeremy, the Estate Wise system can be customised to complement the service offering of any financial advisory practice and can lead to new revenue opportunities for those practices.