



# **An introduction to Homevisitwills added value service for your clients**

*Safeguarding  
your family's future  
is easier than  
you think*



**In today's ever-changing world the businesses that survive and prosper are those that continually add value for their clients.**

We know you already deliver great service and that you care about your client's financial protection.

What you do mirrors our philosophy too.

At Homevisitwills [www.homevisitwills.com.au](http://www.homevisitwills.com.au) we have developed a simple add on service that will give your clients greater control, protect their families and give them peace of mind.

We also know that between 60-70% of your clients need to make use of this service and would do so because they already trust you and the advice you give them.

Making a will is something many people put off doing.

You undoubtedly have advised clients in the course of your work that getting their wills and estate planning in place is an important aspect of their financial protection.

Surveys show that sadly many do not heed your advice.

Here at Homevisitwills we have been working with financial planners, accountants, mortgage brokers and professionals from the finance sector for over 20 years.

We have crafted a bespoke service specifically aimed at providing a value-add service to your business and clients.

By becoming part of the Homevisitwills family you can tap in to 3 very valuable resources:

- 1) Experienced, friendly and professional Wills and Estate planning lawyers
- 2) A simple and efficient system to help your clients complete their Wills and Estate planning in a cost-effective way
- 3) An additional income stream and growth strategy for your business

By adding Homevisitwills to your portfolio of services you will be in a position to help your clients in a way that perhaps your competitors don't.

We are seeking professionals like you to join us in in our vision to help every Australian have a valid will in place.

Help more people overcome the pain of intestacy and provide a valuable service which will not only impact positively your clients but their families too.

**To find out more about the opportunities available please contact us below for an initial chat.**

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## **If there's a Will, there's a way – the HOMEVISITWILLS way!**

Making a will as most people are aware is a very important aspect of life and financial planning.

Recent surveys point to only 35 per cent of Australian adults having a 'current will'.

The survey conducted found that probably half of the Australian population have got a will, but when people were asked if they died tomorrow whether they would be happy with their estate distributed as set out in their will, they said no.

This would indicate that a high % of people WITH a will would leave a problem as it has not been kept up to date.

The survey also found that only 19 per cent of families with young children have a will.

Startling numbers indicating a great opportunity for a business with a passion for helping people protect their families and assets.

The goal of Homevisitwills is to provide a professional, efficient and friendly service to enable every Australian to have the ability to protect their family and assets by making a will at an affordable price.

Homevisitwills works on the basis of low, fixed price wills where a consultant comes to you in your home to take instructions, passes on the instructions to a solicitor who drafts the will and arranges signing.

The service includes:

- Home visit to gather information
- Full signing service at our offices
- Regular review
- 1-hour consultation for executors
- All telephone calls and emails
- All amendments up to day of signing and 30 days beyond
- Qualified lawyers reviewing the drafts and finalizing the document with you

Additional income streams in the area of probates and other legal advice contribute to added opportunities.

To add value to the client experience and make the process professional, efficient and friendly Homevisitwills is constantly working on using new technology and currently has fully automated online instruction taking software and e-learning for new estate planning consultants.

## About Colin Chapman, the Founder

With over 30 years' experience in the financial and legal services industries Colin has seen the effects of both good and bad attention to these 2 vital parts of life planning.



In the 14 years spent in the financial services business between 1980 and 1994 Colin has seen families that have successfully planned for the inevitable along with many that sadly have not.

Since 1995, when he set up Willcraft Services in the UK, Colin has equally seen the effects of not having an up to date Will in place and the benefits of having one.

Without a structured financial and estate plan in place families can be ripped apart when the unexpected happens. Homevisitwills and Wills4Women have been set up to provide people with all the knowledge and information they need in order to ensure security for loved ones when the inevitable occurs.

Colin focuses passionately on providing world class client service to his clients and maintains that this alone has contributed to his 20+ years success in business.

His philosophy is 'Anyone can sell a product, it is HOW it is delivered that leaves the client with a lasting impression, positive or negative.'

Colin is currently residing in Perth, Western Australia and is continuing to serve the people of WA by providing solutions to their Estate Planning issues through Homevisitwills, Wills4women and StoreMyDocs, a personal document storage service.

He has written 2 e-books, 'Where's my Inheritance?' and 'Discover the 7 Secrets That Are Saving Families Thousands' both available on Amazon.

