TOOL 1.3: Offer to health care specialists
PURPOSE: A framework for the design of a marketing brochure targeting Health Care specialists.

THE (BUSINESS NAME) HEALTH CARE SPECIALIST ADVICE AND CONSULTING PROGRAM

Now there is someone to look after you while you are looking after others!

We know you have devoted many years to looking after others and have not been able to find the time to obtain the answers to all those questions you have about financial matters, your business and you and your family's future.

How do we know this? Because at (Business Name) many of our clients are Health Care specialists like you – Medical Specialists, Chiropractors', Medical Practitioners operating their own practice. So we are aware of many of those questions you have. And we'll take the time to understand the other issues which are specific to you.

Are these some of the questions that you need answered?

- How can I legitimately pay less tax?
- How can I build value in my practice and protect that value in the future?
- Is the current ownership structure for my practice the most appropriate for me?
- Do I have the appropriate protection in place – for me as a professional, my business, my family, my future?
- How can I best fund the acquisition of new equipment and the expansion of my practice?
- Should I be investing more in superannuation, my business or property?

Our research shows these are some (but definitely not all) of the important issues on which health care professionals need advice.

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The (Business Name) Health Care Specialists Advice and Consulting Program

This program is all about you!

The components of the (Business Name) Health Care Specialists Advice and Consulting Program are delivered in the order of priority for you and within a timeframe that works for you. So you will receive all the advice that will help you achieve what is important to you:

- Tax effective strategies for you and your practice in your current and future life phases
- A structured practice growth and exit plan
- Strategies to protect your assets, your income, your family and your life both now and the years ahead
- An investment plan to fund the lifestyle that is important to you – now and as your work reduces
- The comfort, confidence and reassurance that allows you and your family to sleep peacefully knowing someone is looking after your best interest and working with you in an environment of trust, empathy and care.

What you can expect from our Health Care Specialists Advice and Consulting Program

A Personal and Business Tax Savings and Effectiveness Plan – Documented advice on all matters tax – receiving your income, structuring your business, planning for retirement, exiting your business and investing both now and in the future.

Business Improvement and Continuity Plan – Advice that will address all the issues around business succession and protection strategies to ensure the continuance of the business. This Plan will also include appropriate advice on funding business expansion and equipment acquisition specific to your goals and practice growth strategies.

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Personal Investment Plan – Strategies that will help you make the appropriate investment decisions to achieve what is important to you both now and in the future. This plan will be developed after examining all the options available to you – including investment property, shares, managed funds, and tax effective investments.

Personal Protection Plan – Protection strategies for your non business assets – your home, car, and the assets and income of your family.

Asset Ownership Plan – Ensuring you have the appropriate strategies in place for the current ownership structure of your business and the current and future ownership of all your assets and wealth.

Debt Management Plan – A review of your current business and personal borrowings and advice on the appropriate debt strategies for the future. This may include restructuring your home mortgage or current business borrowings and/or funding future business expansion, personal investments or home renovations or upgrade.

How do we deliver this program?

We listen: we spend a lot of time understanding what's important to you. That's YOU not us! Once we understand your priority advice needs we'll prepare a proposal detailing the specific offer to you. The proposal will include delivery time-frames and indicative costs.

We introduce: helping you achieve what's important to you will normally require advice from more than one specialist adviser or consultant. We will schedule appointments with the appropriate specialist(s) in the order that is a priority to you and within a time-frame that works for you. At these appointments the specialist adviser will gather all the information required for them to analyse the various solution options and prepare the advice that is appropriate for you.

We advise: At a subsequent appointment we will present this advice to you and discuss it in detail encouraging your questions and ensuring you understand why it is appropriate for you.

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We Document: Our advice to you will be documented, including all the detail around recommended products if applicable, related fees and charges, why this advice is appropriate to you and the value you will experience from this advice.

We Monitor: We monitor all the issues that may influence the appropriateness of this advice on an on-going basis and advise any changes that may need to be considered due to changes in your circumstances, or in the business or economic environment.

We Communicate: Your advisory team will maintain frequent contact with you through our regular publications, on our website and face to face meetings which are scheduled at appropriate intervals. Of course, we encourage you to call us at any time if there are queries you have or issues you would like to discuss.

We Care: At (Business Name), YOU are what's important to us. We will always act in your best interest, make decisions which deliver the best outcomes for you, and deliver our advice in the order that is a priority to you. Achieving what's important to you is what is important to us!

Presentation of this Document

Here are two options in presenting this offer:

- Printed double sided on A4 paper and included in (Business Name) Presentation Folder, or
- Printed 4 sided on A4 folded or appropriate sized paper which can be used with or without folder

A4 double sided:

First side – Introduction, Positioning and Offer

Reverse side – The explanation, business contact and general info

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A4 folded or similar

Page 1 – Cover

Page 2 – Introduction, Positioning and The Offer

Page 3 – The Explanation

Page 4 – General and contact information

It would be valuable to receive advice from a Marketing Specialist on the presentation issues.