

Information Document



THE ESSENTIAL STARTING POINT

Information quickly available to make fully informed decisions.


ADAPT THE ID TO YOUR BUSINESS

Adaptability of document to record any information you require.

EVERYTHING CAN BE RECORDED

Titles, contracts, location of documents, secure logins, details of agreements.

- ✓ Complete financial and asset data management system
- ✓ All your information centrally located
- ✓ Be prepared for change
- ✓ Complete confidentiality with your most trusted advisor
- ✓ Business peace of mind

The creation of the 'Information Document'  was not born from inspiring circumstances. It was not until one of our customers lost their partner, that the need was recognised.

The gathering of personal financial information often takes place at the most stressful and emotional of times, sometimes placing this heavy burden on the less financially literate individual, within the business relationship.

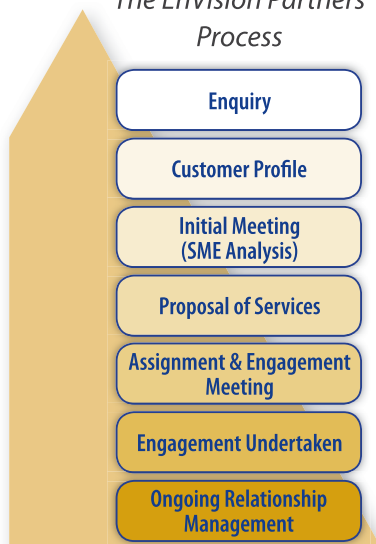
It was from these circumstances, EnVision Partners saw the potential in developing the ID to benefit all of our customers, irrespective of their stage in life.

It is universally known that the management of financial information usually falls to one party in each business relationship. Change in business is inevitable, but the smooth transition through change, 'the ability to be decisive', is sometimes delayed by the need to find accurate information or past financial documents.

Our ID completely and comprehensively gathers and maintains every piece of personal and business information, across all business entities, ensuring a clear path to act upon business change and decision making without delay.

The ID document is the essential starting point for all planning and decision making processes. Whether it is planning for succession, your Will or a tax and cashflow analysis, the comprehensive information gathered enables EnVision Partners to fully understand you, and work with you to make the right decision.

The EnVision Partners Process



Chinchilla

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