

REFLECTING ON YOUR OVERALL WEALTH PROTECTION STRATEGY

SHOULD I BE INSURED?

Is 'self-insuring' the best choice for high-net-worth individuals? Should you gain specialist life insurance and estate planning advice? To help you decide, consider the following.



IN THE FAMILY

Have you considered how you'll pass on your wealth to care for future generations, without causing conflict?



LIQUIDITY FOR LOVED ONES

How long would it take to distribute your estate – and how would your family manage financially during the process?



BUSINESS SUCCESSION PLANNING

Do you have a business succession plan to protect yourself and your business from the unexpected?



CHARITABLE PLANNING

How could insurance help you continue your philanthropic support?

SHOULD I REASSESS MY INSURANCE?

Life changes. If you already have insurance, you may choose to ask yourself these questions to ensure it's ideal for your needs and life stage.



REVIEW YOUR NEEDS

Do you regularly review your optimal level of cover to make sure it best suits your family and lifestyle?



INDUSTRY EVOLUTION

As insurance definitions continually evolve, are your policies still relevant and current?



SMSF STRUCTURING

With ongoing changes to Superannuation, SMSF trustees should regularly consider the impacts for their members. Are you adequately covered?



RELYING ON YOUR EMPLOYER

Does your default employer-sponsored insurance cover protect your specific needs?

GET IN TOUCH WITH ANZ PRIVATE FOR MORE INFORMATION.

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