Network Family Office

FOR PROFESSIONALS

When to involve us

You give the advice. We run the sequence.

AT A GLANCE

A change coming, several professionals, and nobody keeping the order.

We keep your client's professionals, decisions and next steps in the right order, so your advice is acted on when it should be.

THE SIGNS

- Several professionals on one client, all at once
- Handovers that stall between you and someone else
- Your client calling you about everyone else's part
- A change at work that's starting to reach home
- Your client asking "so what happens first?"

THE SITUATIONS

MEDICAL PRACTICES

- A partner joining, buying in, leaving or retiring
- Going separate ways
- Selling or stepping back
- Starting a practice, or a death, illness or sudden exit

FAMILIES

- A sale, an inheritance or a new structure
- A parent's care, or a loss of capacity
- An estate being worked through
- Affairs that are complicated now, or getting there

One professional and no deadline? You've probably got it covered, and we'll say so.

YOUR PART AND OURS

We take the coordination. You keep the advice.

OFF YOUR PLATE	STAYS WITH YOU
Chasing the other professionals	Your advice and your judgement
What happens first, and what waits	Your engagement and your fees
Questions about everyone else's part	Your relationship with the client
A record of who agreed what, and when	The work only your licence allows

HOW IT RUNS

Twelve weeks to start. Longer when it's needed.

WEEKS 1 TO 4	WEEKS 5 TO 10	WEEKS 11 TO 12	AFTER WEEK 12
Structure	Connect	Maintain	If needed
Who decides, and in what order	Everyone working to one plan	Review, and what happens next	Only where there's a genuine need

HOW AN INTRODUCTION WORKS

1 **Someone comes to mind**
A change coming, several professionals.

2 **Your client agrees**
One email introducing us both.

3 **We map it, honestly**
If they don't need us, we say so.

4 **Your role stays yours**
You get a copy of the plan.

WHAT DOESN'T CHANGE

We coordinate. We don't advise.
Licensed advice stays with licensed professionals.

Your client stays your client.
Your advice, your engagement, your relationship.

No referral fees.
Either way. Our fee comes from the client.

Full guide: networkfamilyoffice.com.au/guides/working-alongside-us

Network Family Office

Shaun O'Keefe · Director & Coordinator
shaun.okeefe@networkfamilyoffice.com.au · 0411 10 20 10

We coordinate. You decide.

Network Family Office does not provide financial, legal, accounting, tax or clinical advice.