A NOTE FOR PRINCIPALS AND SMSF TRUSTEES

Your adviser has introduced you to Vestry.

Here is what it is — and, just as importantly, what it will never do.

VESTRY — THE FAMILY GOVERNANCE OPERATING SYSTEM

Well-run family offices keep a discipline most families never see: one current picture of everything they hold, every decision written down with its reasoning, and nothing important left to lapse in a drawer. Vestry gives your family that same discipline as a system — built first inside a real family office, and shared with families managing between $1 million and $50 million.

WHAT IT DOES

One current picture

Every entity, holding and document — the trust, the company, the super fund — on one map, kept current. The answer to “where does it all stand?” in minutes, not months.

Decisions on the record

Your reasoning, in your words, with a date to review it. Judgement your family can inherit — not just assets.

Nothing lapses quietly

Deed reviews, nominations and strategy dates surfaced before they expire. The calendar watches so your family does not have to.

WHAT IT NEVER DOES

Vestry never recommends — by architecture, not by policy.

It will not tell you what to invest in, when to sell, or how to structure your affairs. Every document it drafts is a labelled template that ends at a qualified professional’s desk — your accountant, adviser or solicitor. The judgement stays where it belongs: with you, and with them.

WHY YOUR ADVISER STAYS CENTRAL

Your adviser sees only what you choose to share, at your grant, revocable at any time — and every access is logged where only you can read it. Work reaches them prepared: your answers already in, the open questions marked. And a design decision your adviser will appreciate: professionals pay Vestry nothing and are paid nothing. No referral fees, no commissions. When your adviser works with Vestry, they are working for you.

The overhead of a family office was never the point. Continuity is —
wealth that outlives its founder, with the reasoning intact.