



Deliver Trusted Estate Planning, Increase Assets Under Management, and Earn More!

WHAT'S INCLUDED

Meet LegacyLogic: A Smarter Way to Plan Your Legacy

Each customized estate plan includes:

- ✔ A fully funded Revocable Living Trust
- ✔ Pour-over Will
- ✔ Durable Power of Attorney
- ✔ Healthcare Powers of Attorney
- ✔ Medical Directives
- ✔ Caregiver Companion Guide
- ✔ Document Storage and Retrieval in secure LegacyLogic Vault

Everything you need to protect your legacy, delivered efficiently and affordably.



Combining cutting-edge technology with attorney oversight, LegacyLogic delivers a streamlined, cost-effective estate planning experience your clients can actually understand—ensuring their assets transfer efficiently to loved ones or causes, without court delays or the complexity of a traditional revocable living trust.

Through our secure, intuitive portal, advisors can guide clients through the entire process—no outside attorney referrals, and no risk of losing client relationships.



Earn \$500 for Every Estate Plan



Offer Seamless Estate Planning Service- No External Referrals Needed



Manage More Assets with Full Visibility



Strengthen Client Relationships & Loyalty

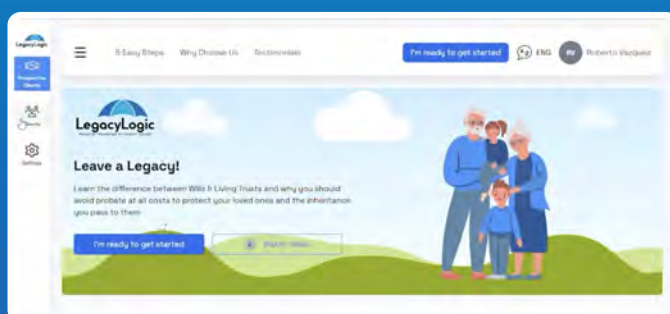


Identify Additional Sales Opportunities

Advisor Benefits



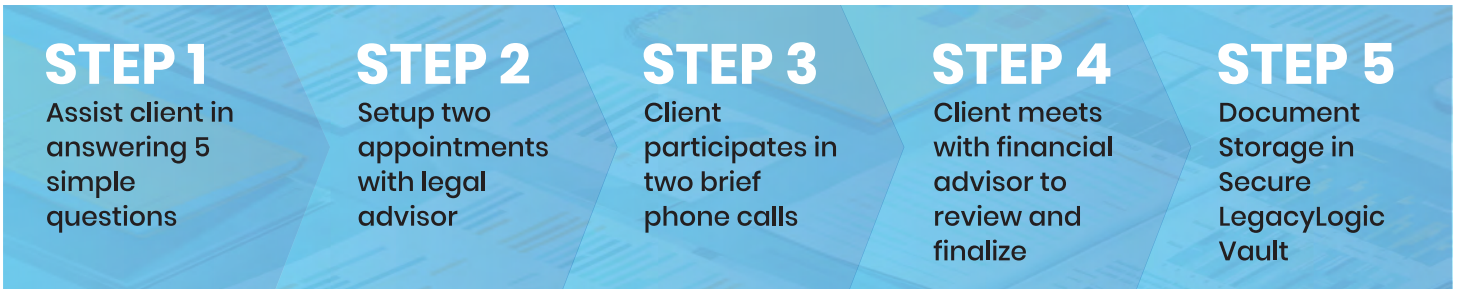
Build Bridge to the Next Generation



HOW IT WORKS

Simple Steps, Powerful Results

LegacyLogic helps you guide your clients through each step with expert legal support and your trusted advice.



OPPORTUNITIES ABOUND

The Great Wealth Transfer

The largest generational wealth transfer in history is already underway—an unprecedented shift that makes estate planning more critical than ever.

By partnering with LegacyLogic, you're positioned to meet this soaring demand with confidence. You can provide an essential, modern estate planning experience—branded entirely as your own—while gaining deep insight into your clients' full financial picture. This not only secures your role in their wealth transition strategy, but opens the door to additional assets under management, new revenue streams, and long-term loyalty from current clients and their heirs.



12,000 Baby Boomers Retire Daily



\$68 Trillion Will Transfer Over the Next 20 Years



Without Estate Planning, 70% of Americans Risk Legal Battles & Excessive Taxes



93% of Clients EXPECT Estate Planning Services, but Only 22% of Advisors Offer Them

Why Your Clients Need Estate Planning

Probate is more than just a legal process—it's a costly, time-consuming, and public ordeal that can drain an estate and create emotional strain for families. Without a proper estate plan, probate court can freeze assets, invite legal contests, expose private financial details, and delay distributions for months and even years. In some cases, up to 30% of an estate can be consumed by court fees, attorney costs, and taxes.



PROBATE

vs.

LIVING TRUST

- COURT Appoints Trustee → YOU Appoint Trustee
- COURT Locates Heirs → YOU List Your Heirs
- Last Will & Testament → Contains a Pour-over Will
- Distributes Assets Using the State's Will or Yours → YOU Determine Distribution: who, when, how much
- Drawn Out with Court Delays → Immediate
- Public Exposure Can Invite Contestability → Private
- Court Costs, Admin & Attorney Fees, Frozen Assets & Delays → Negligible Costs, Entire Setup Takes About 2 Weeks

A trust protects a family's inheritance from spend thrifths, predators, & creditors.

You guide. We support. The client wins.

WWW.LEGACYLOGIC.COM