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CPA / ACCOUNTING FIRM OPPORTUNITY

Better planning. Better clients. Greater retention. New profit-center potential.

Dear CPA / Accounting Professional:

YOU ARE IN THE PERFECT POSITION TO IDENTIFY THE OPPORTUNITY

You understand your clients' businesses, income, tax exposure and accumulated wealth. That makes the CPA relationship one of the most valuable places to identify clients who may benefit from coordinated retirement, insurance, estate, asset-protection and wealth-preservation planning.

LION CAN EXPAND WHAT YOUR PRACTICE CAN OFFER

Legacy IMO, Inc. provides the planning concepts, case-development resources and implementation infrastructure. The goal is not to turn a CPA into an insurance producer or replace independent tax or legal advice, but to create a coordinated professional relationship around sophisticated client needs.

A DIFFERENTIATED CLIENT-ACQUISITION AND RETENTION STRATEGY

Advanced planning can give successful business owners, investors and families another reason to seek out and remain with your firm. Appropriate strategic relationships can also create additional economic opportunities, subject to professional-responsibility, licensing, referral-fee and other applicable rules.

LET'S BUILD THE PROFIT CENTER YOUR COMPETITORS DON'T HAVE

We invite you to a private presentation of LION and the client profiles for which the methodology may warrant evaluation. Tax outcomes depend on individual circumstances, transaction structure, applicable law and continued compliance; no particular tax result is guaranteed.

Sincerely,

Thomas C. Cook, Esq.

Legacy IMO, Inc.