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ATTORNEY / ESTATE-PLANNING OPPORTUNITY

A powerful planning resource for sophisticated clients.

Dear Attorney / Estate-Planning Professional:

EXTEND THE PLANNING CONVERSATION

Clients seeking estate planning frequently have significant retirement assets, closely held businesses, insurance needs, liquidity concerns and wealth-transfer objectives. LION creates a framework for coordinating those issues with the legal plan.

SUPPORT THE ATTORNEY-CLIENT RELATIONSHIP

Legacy IMO, Inc. does not replace legal counsel. We work with the client's attorney and other professionals so insurance and financial implementation can be coordinated with trusts, entities, succession planning and estate objectives.

A DIFFERENTIATED RESOURCE

For attorneys serving business owners and affluent families, access to specialized case-development resources can deepen client relationships and create additional opportunities for comprehensive planning.

LET'S COLLABORATE

We welcome a private discussion about how LION can complement your estate-planning practice and how an appropriate professional relationship can be structured consistent with applicable ethics, referral and licensing rules.

Sincerely,

Thomas C. Cook, Esq.

Legacy IMO, Inc.