



Direct: 702-470-4141 | Office: 702-99-NOTAX | LegacyIMO.com

FAMILY OFFICE OPPORTUNITY

Institutional thinking for generational wealth.

Dear Family Office Professional:

ADVANCED PLANNING FOR COMPLEX FAMILIES

LION brings together retirement-asset analysis, life-insurance optimization, liquidity planning, tax coordination, asset protection, estate planning and multigenerational wealth considerations in a single advanced-planning conversation.

COORDINATE RATHER THAN REPLACE

Legacy IMO, Inc. is designed to work alongside the family's existing attorneys, CPAs, investment advisors and other fiduciaries. Each strategy should be evaluated against the family's objectives, legal structure, tax position and risk profile.

PRESERVE OPTIONALITY AND LEGACY

For appropriate cases, insurance can serve as one component of a broader architecture involving liquidity, wealth transfer, succession and long-term family governance.

PRIVATE CASE CONFERENCE

We welcome the opportunity to review an appropriate family-office case confidentially and determine whether the LION methodology adds value to the existing advisory team.

Sincerely,

Thomas C. Cook, Esq.

Legacy IMO, Inc.