



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

FINANCIAL PLANNER / ADVISOR OPPORTUNITY

Keep the relationship. Keep managing capital. Add another wealth-planning engine.

Dear Financial Advisor:

UNLOCK A NEW CLIENT CONVERSATION

Many clients hold significant qualified retirement assets that may not currently be part of the advisor's active management. LION provides a framework for determining whether eligible assets can appropriately become part of a broader retirement, insurance, liquidity, tax and legacy strategy.

DESIGNED TO COMPLEMENT THE ADVISOR

The concept is not intended to replace professional investment management. The objective is to coordinate insurance and investment planning so the advisor can remain central to the client relationship while adding another sophisticated planning capability.

REVENUE SHARE AND JV OPPORTUNITY

Legacy IMO, Inc. is interested in strategic relationships with advisory firms that want to make LION an ongoing part of their offering. Any revenue share, referral arrangement or joint venture must be structured in accordance with applicable securities, insurance, licensing, compensation and firm-compliance requirements.

LET'S REVIEW A CLIENT TOGETHER

We welcome a private 30–45 minute presentation and case review. Bring an appropriate client with substantial qualified retirement assets and we can evaluate whether the methodology is suitable for further professional review.

Sincerely,

Thomas C. Cook, Esq.

Legacy IMO, Inc.