



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

INSURANCE AGENT OPPORTUNITY

More cases. Larger cases. Existing clients. Another arrow in your quiver.

Dear Insurance Professional:

A DIFFERENT CONVERSATION WITH THE CLIENTS YOU ALREADY HAVE

LION gives insurance professionals a framework for identifying eligible retirement assets and exploring whether a properly structured life-insurance strategy may fit a client's broader retirement, liquidity, tax, estate and legacy objectives.

WHAT IT CAN MEAN FOR YOUR PRACTICE

The opportunity is to create larger-case conversations, reconnect with existing clients, reach business owners and coordinate more effectively with financial advisors and other professionals. Legacy IMO, Inc. provides advanced case-development and implementation support so the producer does not have to become the tax, trust and advanced-planning expert alone.

REVENUE SHARE AND JOINT VENTURE

Legacy IMO, Inc. is interested in appropriately structured relationships with qualified insurance professionals and agencies that want LION to become an ongoing part of their practice. Compensation and revenue-sharing arrangements must comply with carrier, licensing and regulatory requirements.

LET'S REVIEW A CASE TOGETHER

Bring us an appropriate client with substantial qualified retirement assets or an advanced planning need. We can review the facts together and determine whether the LION methodology warrants further evaluation. Historical production examples are not guarantees; actual results depend on the client, carrier, contract and implementation.

Sincerely,

Thomas C. Cook, Esq.

Legacy IMO, Inc.