



LEGACY IMO, INC - LOAN OFFICER LETTER

A NEW PROFIT CENTER. MORE CLIENT VALUE. MORE REFERRALS.

Dear Loan Officer:

What if every referral you make could create more value for your client, more opportunities for your loan officer business, and an entirely new income stream? Legacy IMO, Inc. works with professionals who want to move beyond the traditional transaction and become a resource their clients remember, refer, and return to.

THE REFERRAL OPPORTUNITY

Our lowest agent did over \$311,000 for the year in just referrals. Learn to average 1-3 additional leads per referral. A single relationship can lead to the client, the client's family, business partners, employees, investors, and other professionals in their circle. The objective is to help you create a deeper relationship instead of completing one transaction and hoping the client remembers you years later.

A DIFFERENT CONVERSATION ABOUT PROPERTY AND INVESTING

"Why would anybody buy a property taxed when the IRS has a program that allows you to buy and sell ANY asset class 100% tax free where this program MUST get signed off by the IRS" This is the type of advanced planning conversation our program is built to introduce. Any tax treatment depends on the actual structure, applicable law, eligibility, transaction, and required approvals; the quoted statement above is program marketing language and is not a guarantee that every transaction or asset will qualify.

HELP CLIENTS ATTACK THE MORTGAGE WITHOUT RAISING THE MONTHLY BUDGET

Learn how your client can pay ALL of their bills and pay off their mortgage in 9 years or less without paying one dollar more per month! For the right household, restructuring cash flow, debt priorities, savings, and financial assets can create a very different path toward debt reduction. Individual results depend on income, debt, interest rates, spending, available assets, and implementation.



QUALIFIED RETIREMENT MONEY CAN CREATE ANOTHER REAL ESTATE CONVERSATION

Learn how your clients can legally roll their qualified 401k, 403n, IRA or any defined contribution defined benefit through an IRS process that will allow them to buy property and OR invest in ANY asset class legally 100% tax free. Eligibility, rollover rules, prohibited-transaction rules, plan provisions, investment restrictions, and tax treatment vary. Clients should have the specific transaction reviewed by qualified tax and legal professionals before implementation.

BECOME MORE THAN THE LOAN OFFICER

The most valuable loan officers are not remembered only for quoting rates or closing loans. They become connectors to opportunities, solutions, and trusted professionals. Legacy IMO, Inc. can help approved loan officers introduce clients to advanced conversations involving wealth strategy, retirement assets, tax planning, debt reduction, estate planning, protection, and long-term legacy objectives. That gives you another reason to contact past clients, another reason for prospects to meet with you, and another reason for clients to introduce you to the people they know.

LEARN HOW WE CREATE TOP PRODUCERS

Learn how we create some of the biggest top producers in the industry. We have been around 38 years and do business in all 50 states and 45 countries. Our model is designed to show approved professionals how to identify opportunities, make qualified introductions, create additional referral activity, and expand the value they bring to their existing client base.

THE OPPORTUNITY IS NOW

We are looking for loan officers who want to become approved vendors and learn how to integrate these strategies and referral opportunities into their existing business. You do not need to abandon your loan officer practice. The objective is to make the relationships you already create more valuable - to your clients and to your business.

TEXT 702-470-4141 FOR AN INTERVIEW TODAY

TO BECOME OUR APPROVED VENDOR

LEGACY IMO, INC.

PROTECT • PRESERVE • PROSPER

Important: Results and income are not guaranteed. Tax, retirement-plan, lending, insurance, referral, and investment strategies are subject to individual facts, applicable federal and state law, licensing requirements, plan documents, product terms, and professional review. Nothing in this letter is legal, tax, investment, or accounting advice. Statements regarding tax-free treatment apply only where a particular structure and transaction actually satisfy all applicable requirements.