LEGACY

TURN THE CORNER AND SUCCEED ON YOUR TERMS

LINK: WORKING IN COLLABORATION

Collaboration is a great idea; until we actually have to work with others. The simple fact is that working on a client case alongside other professional advisors can be challenging, difficult, and sometimes downright impossible. That's why we created LINK.

THE PROBLEM

Take any two people, no matter how much they like and respect each other, put them in a room and it's just a matter of time before it becomes a competition for the truth. Working together can be tough, even when it's good.

The problem with working collaboratively is that most people are very well-intended, but poorly equipped to be part of a collaborative team. Most people don't even know the differences between cooperation and collaboration, let alone how to make them work successfully.

"I've worked on behalf of my clients alongside other professional advisors for decades. But what I learned in LINK brought a whole new level of awareness, understanding, confidence and process to collaborating. I wish I'd learned this a long time ago."

- Larry Lehmann
J.D., AEP®, CAP®,
Legacy Wealth Coach™

HOW WE HELP

LINK is directly aimed at the mindset, process and tools to create and operate in powerful, collaborative teams. Wealth holders need a team. The better you can work in that team, the better results they get, and the better results you'll enjoy. It's time to turn the corner and succeed on your terms, and help others do the same.

WHAT YOU'LL GET

When you participate in LINK, you'll finish the program with:

- How to bet the "buy in" of both prospects and clients in taking a collaborative approach
- The "right questions" to ask prospects, clients and potential collaborators
- A process to create more trust between everyone involved
- The keys to getting engaged by the client to carry out a collaborative process
- A proven system to guide the communication between your client and the other advisors
- How to handle the initial face-to-face meeting with other advisors, including detailed talking points for the meeting
- The 4 Phase Model for Planning (this is a game-changer)
- How, who and when to run collaborative meetings
- A specific structure for strategy planning meetings and client recommendation meetings
- The confidence to execute the 5 Best Practices of Collaboration

HOW WE DO IT

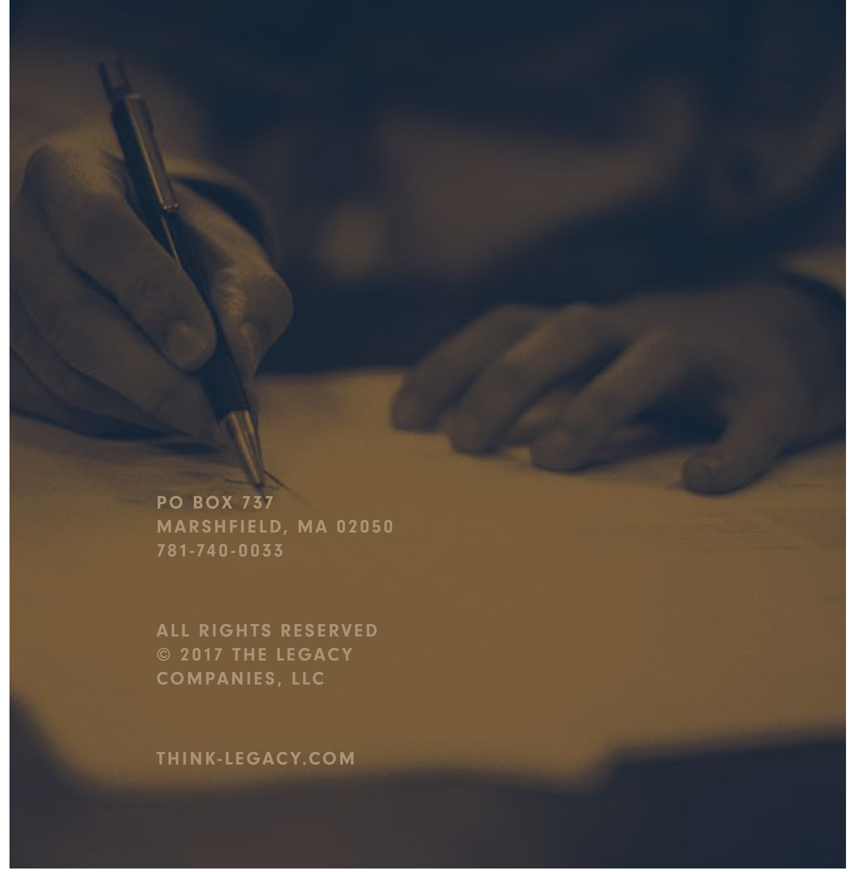
LINK is delivered as an online program, available 7 days a week, 24 hours a day in our digital learning center. It is self-paced and uses video, transcripts, quizzes, handouts and reference documents to ensure you have more than just a cursory understanding of collaboration; you'll have practical confidence.

Our team is ready to address specific questions, encourage you and support you as you complete the online course of study.

ACCESS THE PROGRAM

- Online — Legacy's convenient online learning platform
- Digital Live — Highly interactive and engaging sessions delivered by webinar
- On Demand Live — Delivered live in a classroom environment for face-to-face interaction

The program includes a 1-year license to use Legacy's web-based application and program Intellectual Property



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