ECHO: GENERATIONAL WEALTH SYSTEMS

When families make decisions based on your recommendations, the results will echo long into the future. Their decisions become part of your legacy and theirs. Someone will serve your client for generations; *we think it should be you.*

THE PROBLEM

The single greatest risk to your business model is a lack of generational reach.

Really? Yes.

When your current clients die and their assets move to the next generation, those clients will leave you (the odds are more than 90% against you).

And it's worse. 70% of estate plans fail and cause the family to lose their wealth because of family cohesion challenges: they fight, and then go broke.

"I was working with families of affluence and was doing a great job technically, but I didn't want to get into all the family dynamics. I'm not a therapist or counsellor and never wanted to be. Now I have a process for engaging with clients that addresses what really matters to them, gets them all on the same page, and creates clients for generations – and I didn't have to stop being an advisor!"

- Tim Balber, JD, AEP®

HOW WE HELP

You can keep your clients for life, if you engage them differently, with a process that addresses the family, the future, and the wealth.

WHAT YOU'LL GET

You will complete ECHO with:

- A powerful new way to capture your clients' ideal future for themselves, their wealth, and their family
- The ability to discover and document shared family values, across generations
- The method to create a meaningful family financial philosophy (mission statement)
- The ability to actually engage the next generation and create relationships that will stick
- The ability to capture the family story (the story that holds them all together) through a turnkey biographical interview process
- The process for confidently hosting family meetings, including agenda's and exercises
- The knowledge of Why, When and How to introduce a family wealth counselor
- The ability to create one-of-a-kind client documents using our web-based application

HOW WE DO IT

ECHO is an intensive skills-focused program. You'll join our team and dig in to the best practices of successful families and how you can help your clients implement those practices.

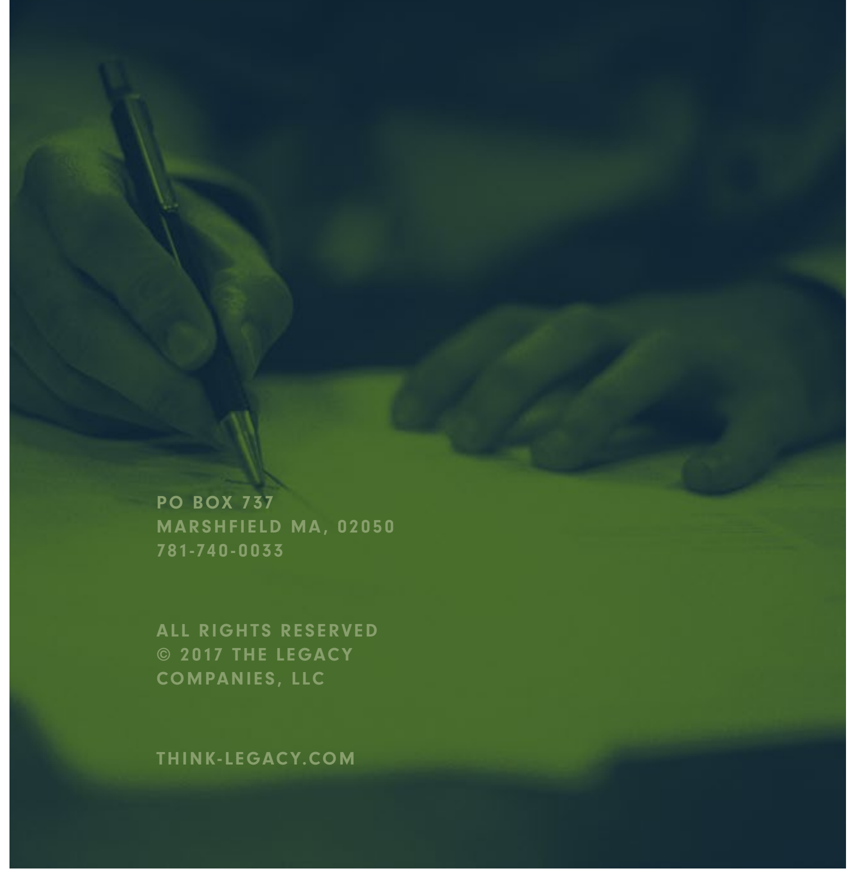
We'll provide you with tools, processes and practice at engaging families in meaningful intergenerational discovery so that they can craft a future that matters to them, and you can help them implement it.

We have a special faculty that we bring to this program and so you'll be hearing "on-the-ground" reports from people who regularly work with families of affluence.

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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