

“Offer your clients Estate Planning services without hassle.”



ESTATE PLANNING SERVICES SUPPORTING YOU, THE TRUSTED ADVISOR.

From start to finish, we are always there to coordinate the process.

- Discover your clients' risk profile
- Leave the Estate Planning workflow to us
- Increase your revenue stream, between \$500 to \$3500 per client
- Provide proactive Estate Planning advice
Comply with ASIC RG 175, Best Interest Duty and Know Your Client Rule



LGEN PROVIDES TRUSTED ADVISORS WITH A UNIQUE AUTOMATED ESTATE PLANNING WORKFLOW PLATFORM.



A patented Workflow Platform integrating workflow from all Estate Planning stakeholders.

Identify the profile of your clients

Facilitate and build the Estate Plan

Create and maintain regular client contact

GROW YOUR BUSINESS NETWORK

Estate planning gives you the ability to link other services to your core business. Provide additional services to your clients, more often, leading to additional revenue for your business.



Online Resources

For information on Estate Planning for individuals and families <https://estateplanning.family>
For information on providing Estate Planning Services via the LGen Platform <https://lgenestateplan.com>
LGen's LinkedIn page <https://www.linkedin.com/company/lgen-solutions>