



ESTATE PLANNING SERVICES SUPPORTING YOU, THE TRUSTED ADVISOR.

“OFFER YOUR
CLIENTS ESTATE
PLANNING SERVICES
WITHOUT HASSLE.”

LGen will coordinate the whole process for you, from start to finish

- 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**
profile your clients
- **Facilitate**
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>

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