



LightYear Wills – the Next Level

Always making sure we are lightyears ahead with our patent pending automations

This webinar will commence at 10:00am AEDST. Please use the chat feature to ask any questions throughout the webinar.



7 May 2020

Australia needs you help



Justice Jeremy Curthoys, who was scathing of lawyers' "indefensible" legal fees. Credit: WA News

Perth

Legal fee scandal: Lawyers 'feast' on Perth family estate

The COVID19 attack on our society and economic, personal and financial freedoms has brought estate and life planning into sharp focus. How many Australians do not even have an enduring power of attorney or a Will? How many a newsagency Will? And how many a Will constructed by a lawyer many years ago that is not specific enough or really is not up to scratch in terms of trustee companies, shareholdings and protection from family provisions claims?

It is time to step up and with the LightYear Docs and Abbott & Mourly Lawyers solution you can control the process, build great Wills and EPOAs in a single client meeting without breaching any legal professions laws, charge premium fees and look after a client's family.

The Process

- Make the client aware with the Client engagement letter and email. This can include a data capture but there may now be a better way thanks to COVID 19
- Is it a single or double will?
- Enter data, finish the interview and get the PDF document. Put into a PDF software such as Nitro and watermark with draft then send to client with a time frame for execution – *Book it in*
- Execute using a Zoom and if need be get Tony Anamourlis from Abbott & Mourly to sit in and sign off on both of the Wills and EPOAs for \$495 for LYD Will and EPOA.
- For previously married testators, problem children, threat of a legal challenge or if testamentary trusts are desired then use LYD Will and testamentary trust. For this you need sign off from Abbott & Mourly

The Financials for the LYDWill and EPOA

Number of LYDClient Wills + EPOA pm	Fees \$ \$1,600 per couple	Time per Will and EPOA - 2 hours	Per Annum Fees \$
2	\$3,200	4 hours	\$38,400
4	\$6,400	8 hours	\$76,800
6	\$9,600	12 hours	\$115,200
10	\$16,000	20 hours	\$160,000

Number of LYDClient Wills + EPOA with Protector per month	Fees \$ \$4,500 per couple	Time per Will and EPOA 3 hours	Per Annum Fees \$
2	\$9,000	6 hours	\$108,000
4	\$18,000	12 hours	\$216,000
6	\$27,000	18 hours	\$324,000

The Solution - LYProtect

- LYProtect is up and running now with a monthly fee of \$395
- Complete unlimited access to our Succession, Asset Protection and Estate Planning platform – all you need to really make a difference and build an exciting income stream with real solutions tailored for clients. Still have access to all other low cost, high strategy value LightYear Docs companies, discretionary trusts and other SMSF documents or upgrade when need to
- But it is no good without training and strategy support:
 - There are more than 20 SAPEP training videos on the site
 - Access to our strategy support
 - 2 x specialist SAPEP trainings a month – one technical followed two weeks later with a case study focused on the technical
 - Access to accreditation as a SAPEP adviser – to start in May 2020



Email:
support@lightyeardocs.com.au



Skype:
smsfbuddha



Facebook:
[@ILoveSMSF](#) [@LightYearDocs](#)



LinkedIn:
[@GrantAbbott](#)



Web:
lightyeardocs.com.au