



The LightYear Docs Licensing Solution

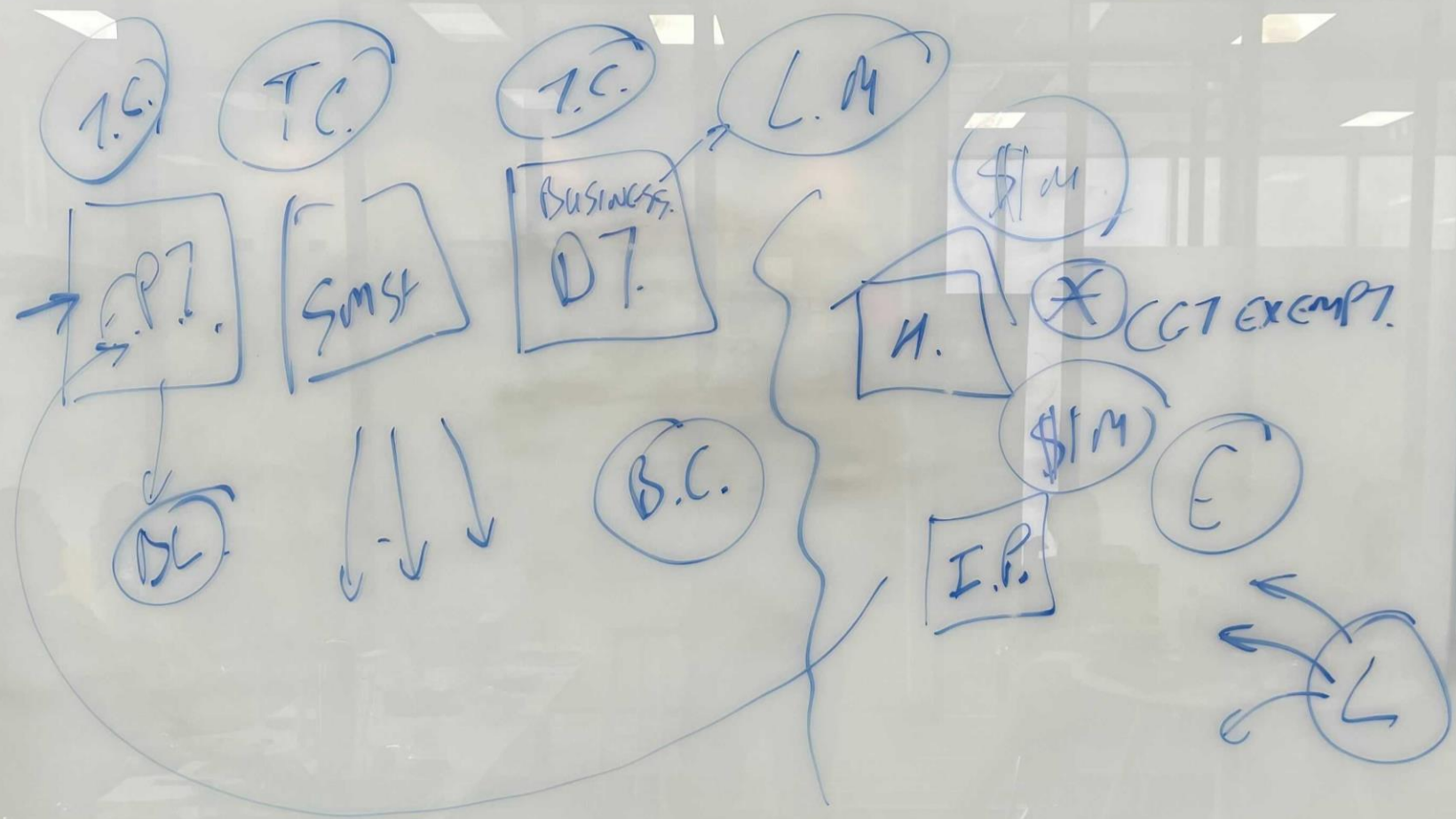
This webinar will commence at 12.30pm ADST.

Please use the chat feature to ask any questions throughout the webinar.

11 February 2021



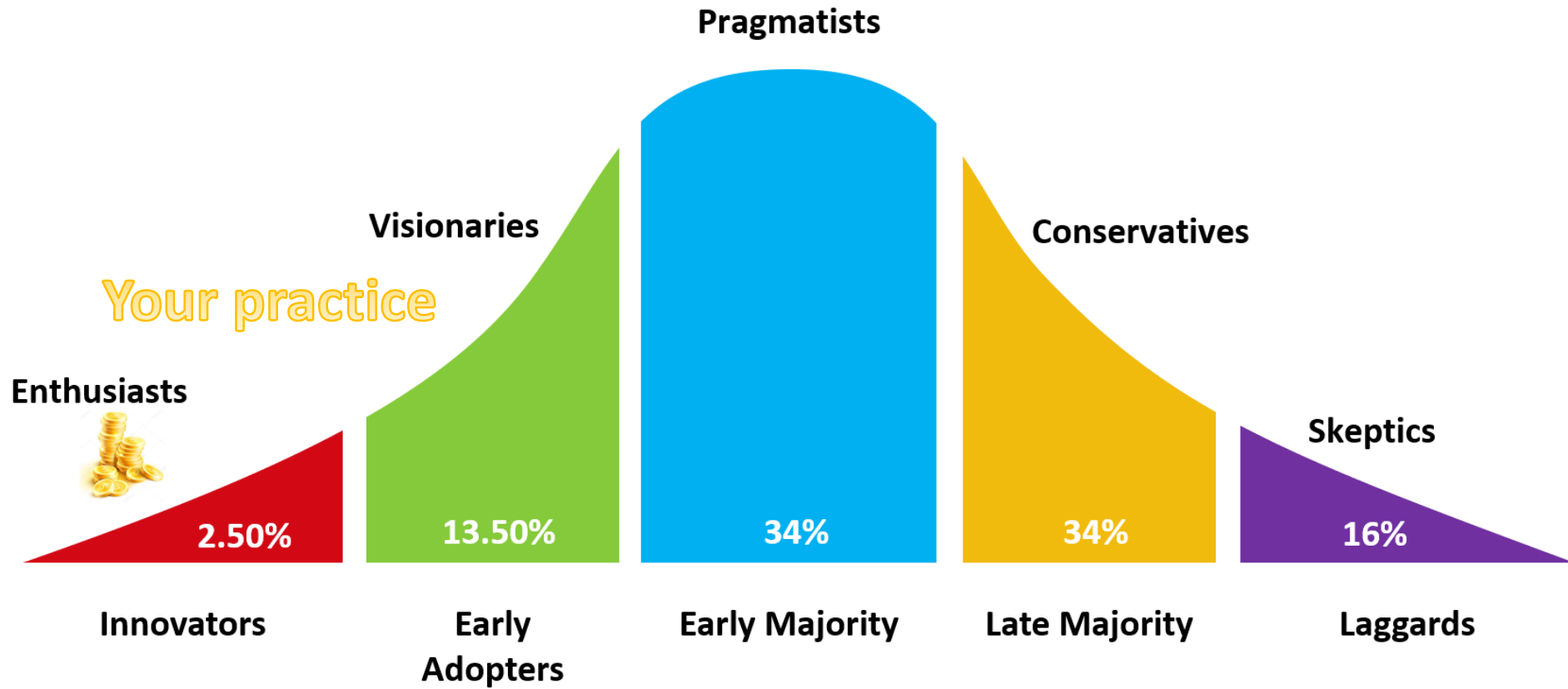
Protecting Family Wealth with succession, asset protection and bloodline planning



- Post-it
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Do you see where we are going with LightYear?



What is Licensing?

For those advisers with franchise clients you know exactly what licensing is:

A **franchise** is a **licensing** agreement whereby a **franchisee** pays a fee to a franchisor for the rights to set up a business using the franchisor's brand name and business marketing systems.

17 Nov 2020



What can you license?

- First off you cannot license goodwill
- But you can license:
 - Trademarks – make sure you have “words” or “logos” trademarked
 - Copyright
 - Patents
 - Marketing processes
 - Business processes
 - Manuals
 - DATABASE!!!

Assign and Lease Back to Protect Assets!

Family Protection Company

Step One
Family Protection Trust
– Non Risk Structure



Family Beneficiaries
Lineage or Bloodline

Step Four: License

Step Three: Assignment of Property

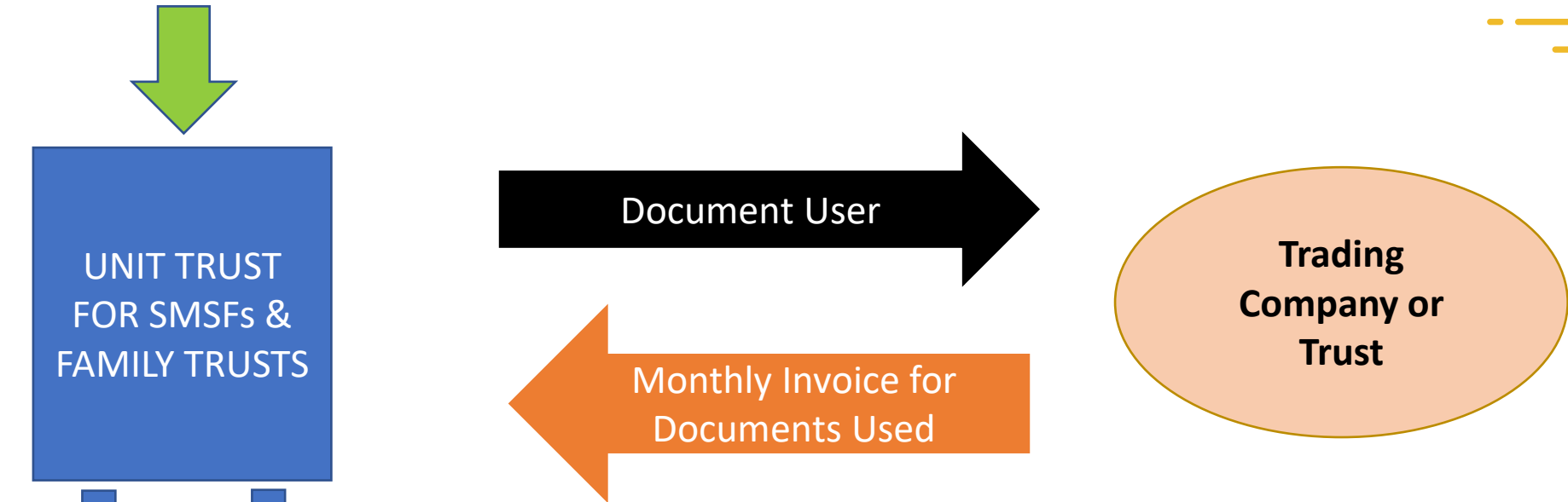
Trading Company or Trust

Step Two: Identify Licensable Property	Market Value
Trademark	\$50,000
Marketing Processes	\$40,000
Database	\$500,000
LightYear Docs License	\$\$\$?

Some ideas and thoughts

- Has the property been passed in by the owner to the trading entity? If so then the value at the time can be used to create a loan account with the company or trustee. May help with Div 7A issues
- CGT on transfer in and secondary transfer across to related Family Protection Trust. Use discounts and small business exemptions if you can
- In the future look at creating or acquiring Licensable Property in the FPT or ????? – SMSF/SUIT

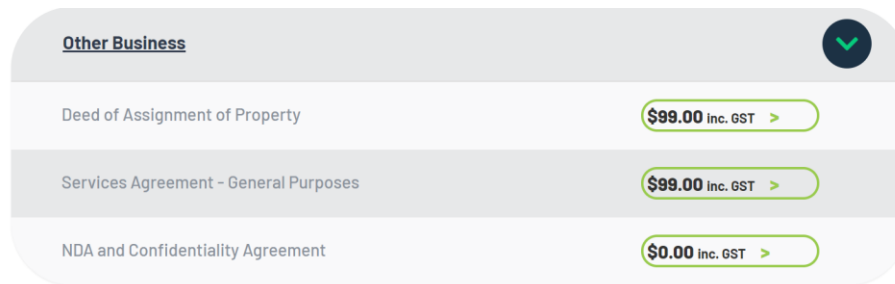
LightYear Docs License – Five Year Annual Payment or Lump Sum for Five Years



Invoice Number	Date	Product Name	Amount
N/A	Feb 10, 2021	Leading Member Kit - Upgrade of SMSF Deed and Corporate Trustee to Leading Member control	\$198
N/A	Feb 10, 2021	Declaration of Trust	\$99
N/A	Feb 10, 2021	Member Appointment - Leading Member SMSF	\$49
N/A	Feb 10, 2021	Company Constitution Variation to Leading Member Discretionary Trustee Company	\$99
N/A	Feb 10, 2021	Leading Member Discretionary Trust	\$99
N/A	Feb 9, 2021	The Successor Director Solution - Multi Company plus upgrade Constitution	\$145
N/A	Feb 9, 2021	Changes to Discretionary Trust Positions and Name	\$99
N/A	Feb 8, 2021	Related Party LRBA(Property) meeting ATO Guidelines	\$450
N/A	Feb 8, 2021	All Purposes Loan Agreement	\$99
N/A	Feb 8, 2021	All Purposes Loan Agreement	\$99
N/A	Feb 8, 2021	Family Allowance Agreement	\$99
N/A	Feb 8, 2021	SMSF Investment Strategy - Fund	\$49
N/A	Feb 3, 2021	Advance Care Directive and Enduring Guardian - NSW	\$99
N/A	Feb 2, 2021	Simple SMSF Deed of Variation	\$99
N/A	Feb 2, 2021	SMSF Establishment - with Corporate Trustee	\$99

What is coming

- We will finalise the License agreement tomorrow for sign off by Abbott & Mourly
- Then it will stand in



Other Business	
Deed of Assignment of Property	\$99.00 inc. GST >
Services Agreement - General Purposes	\$99.00 inc. GST >
NDA and Confidentiality Agreement	\$0.00 inc. GST >

About our Business & Commercial Agreements

- Next is an automation for Strategists only – Assignment and Lease Back



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