



LEGACY ADVISORS NETWORK

What LAN Has in Store for 2023

Phoenix Fly-In

February 27, 2023

Welcome & Housekeeping

Phoenix

FEBRUARY 26 - 28



LAN Meeting Ground Rules



Be mentally present.



Engage all voices.



Actively listen.



Be brief. Share the air.



Pose questions and solutions.



Practice "Yes, and..."



Stay out of the weeds.



Attack the problem, not the person.



Park off-topic comments.

You Are Shaping Our Agenda for 2023

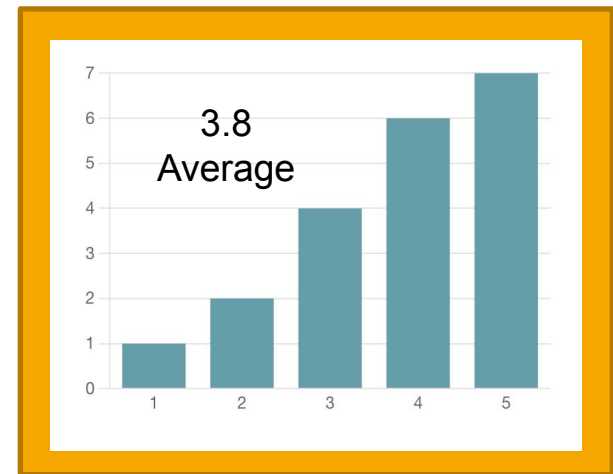
- **Member Survey and 1:1 Conversations**
 - November 2022 - February 2023
 - 87% survey response rate
 - 26 1:1 conversations
- **Designed to:**
 - Educate and create connection with new Executive Director
 - Gauge member awareness, engagement and alignment with mission & priorities
 - Understand what's working and what needs improvement
 - Measure our baseline from which to continue to elevate

Personal Objectives as LAN Member

community
processes,
tools,
technology
desire
practice
management to professional
relationships
coaching & grow building
mentoring acumen
marketing & insights
like-minded learn &
best-in-class knowledge

What You Value in LAN Today

- Relationships, networking and member support
- Best-practice sharing – fly-ins and case studies, in particular
- Access to tech / software solutions at discounted rates
- Deepening knowledge in the practice of business planning
- Processes and templates
- Tapping into members' unique areas of expertise
- Joint work opportunities
- Addition of Executive Director to provide focus and momentum / get stuff done



Top Priorities Desired by Members

1. **Clarity of LAN vision**
2. **Define and educate members on a:**
 - Codified, written, executable, repeatable LAN process
 - **LAN-endorsed tech platforms and when to use each**
 - **Streamlined library of LAN templates, tools for advisors**
 - Process for joint work teaming and leveraging members' expertise
3. **Provide marketing support with:**
 - Library of LAN-branded content, presentations, blogs, social posts that reflect LAN approach
 - Lead-gen and client acquisition support
4. **Launch cloud-based membership platform:** communication, connection, resources
5. **Implement clear onboarding process**
6. **Get small groups up and running**
7. **Add qualified advisors** in metropolitan markets not currently represented
8. **Address meeting cadence:** Fewer large meetings, focus on small groups, video fly-ins
9. **Individual vs. Firm pricing model**

LAN Mission

Our Purpose: Why We Exist

Client Impact Language

To impact the long-term success of private and family-owned businesses—the lifeblood of our communities.

Advisors

To guide advisors in the business owner market to accelerate their success and achieve exponential business growth.

Our Core Business

LAN provides the playbook to advisors that helps them distinguish themselves to their business owner clients and generate wealth for all involved.

We do this by delivering a fully integrated, best-in-class system of people, processes and tools to help you:

- serve as a trusted consultant with your clients
- grow your business—individually and through collaborative teaming opportunities; and
- continually learn with smart, highly engaged peers and industry experts.

LAN 1-Year Plan Accomplished

- **Membership:** Minimum 50 members with mix of seasoned and newer advisors growing in the business owner market
- **Committees Guiding Progress**
 - Membership (Scott), Practice Enhancement (Catherine), Tools & Playbook (Joe/Tommy); Collaboration & Team Selling (Rick); Strategic Alliances/Preferred Partners (Paul)
 - Define and publish preferred tools, templates, processes
- **Small Groups Re-constituted:** Common focus, supported and connecting
- **Joint Work Opportunities:** Defined parameters for joint work leading to more cases and success stories
- **Preferred Partner Program** defined and operational
- **LAN as the “Go To” Resource** for business cases by 5 GAs
- **LAN Advisors Engaged:** Leveraging LAN online community, committees, brand

LAN 1-Year Plan Accomplished

- **Metrics (Goals for 2023)**

1. **Minimum** 50 members
2. Every advisor has at least one case
3. Experienced advisors have 2x their 2022 cases
4. # of joint cases underway

Questions & Answers

