



YOUR GUIDE TO JOINING & USING THE LEGACY ADVISORS NETWORK SHAREPOINT SITE

Joining the Site

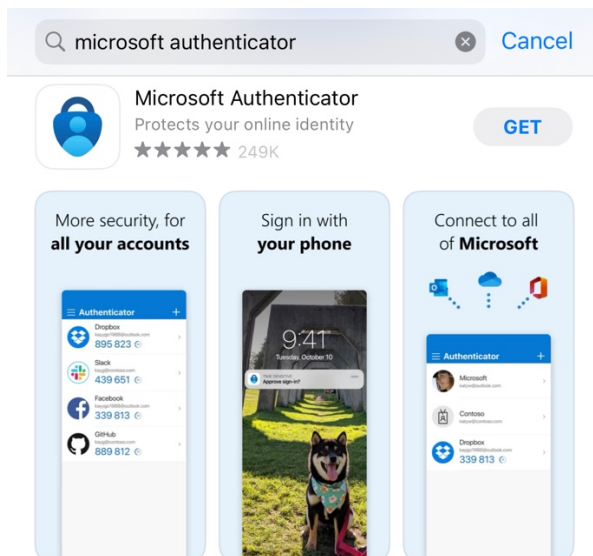
Getting our members online with our dedicated LAN SharePoint platform will take a few steps on your part. Thank you in advance for your patience as you work through each step.

Once on, you will have access to a set of tools that will help you build your business owner practice and accelerate your success.

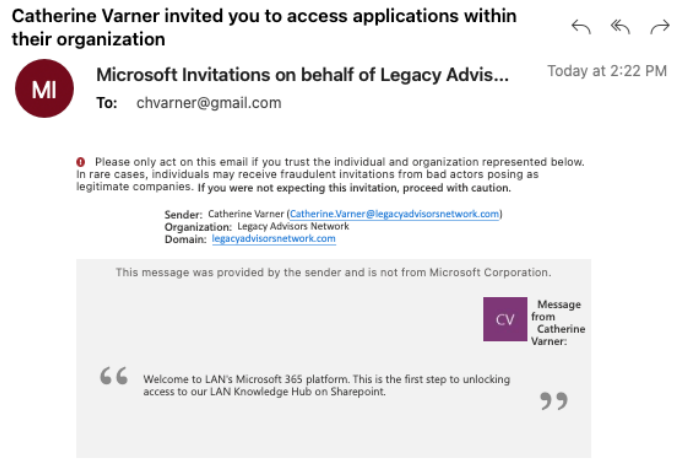
Follow These Steps for Part 1 of the Process

Pre-Setup Step for Everyone Using @financialguide.com Email:

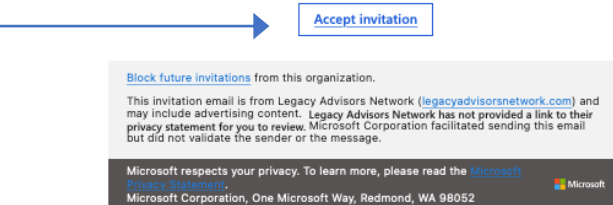
Before you begin, download onto your mobile phone from the app store the Microsoft Authenticator app.



1. You will receive an email from Catherine Varner that looks like this.

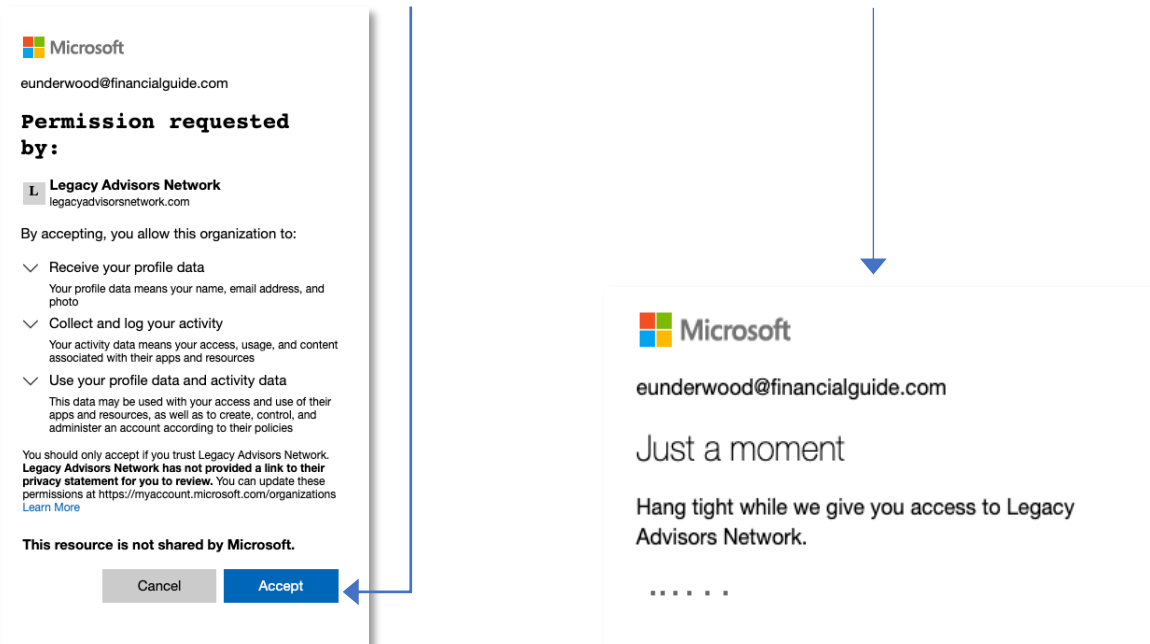


2. Click on “Accept Invitation.”

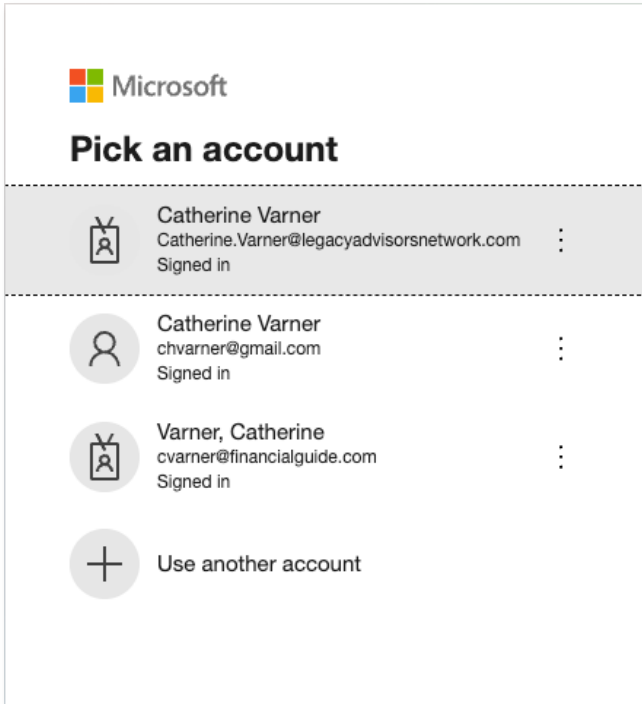


3. This screen will appear, next.

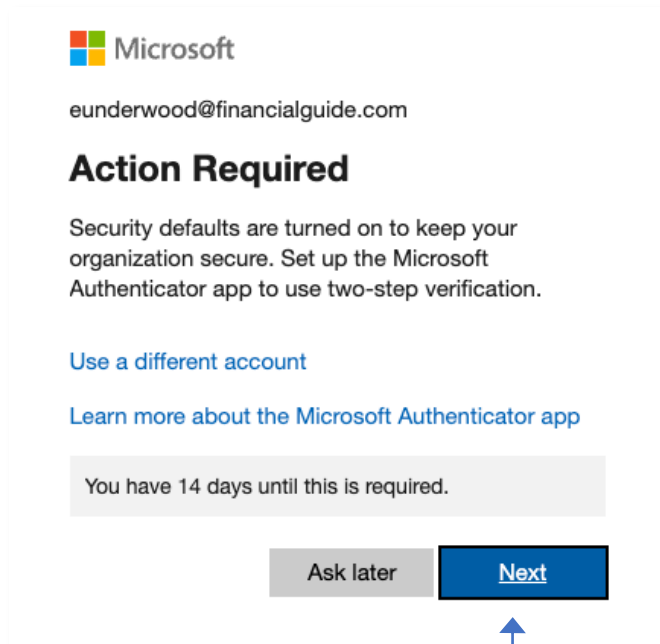
Click the blue “Accept” button, after which you will be asked to wait a moment.



- 4a. If you have multiple accounts associated with Microsoft 365, you will see a screen that looks like this. **Select the account associated with your OBA email (unless you do not have one, in which case you will select your @financialguide.com email).**

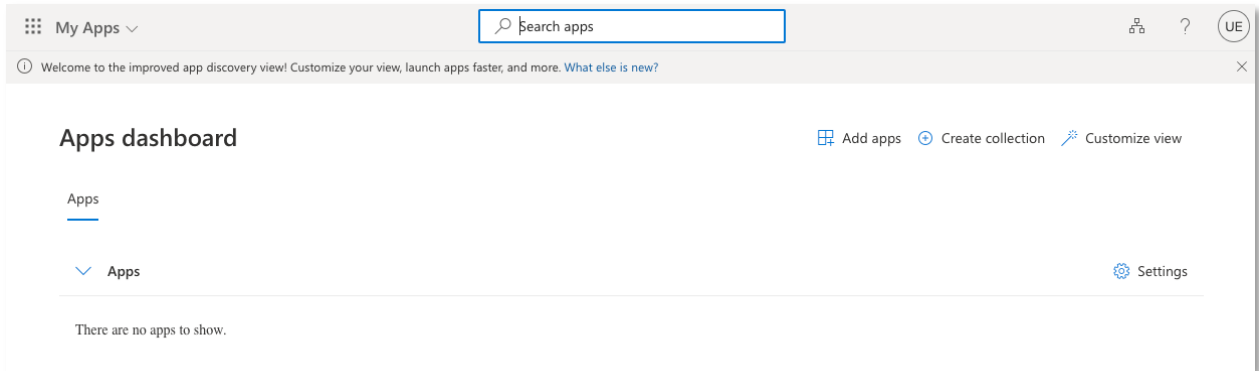


- 4b. If you select your @financialguide.com email, you will see this screen.



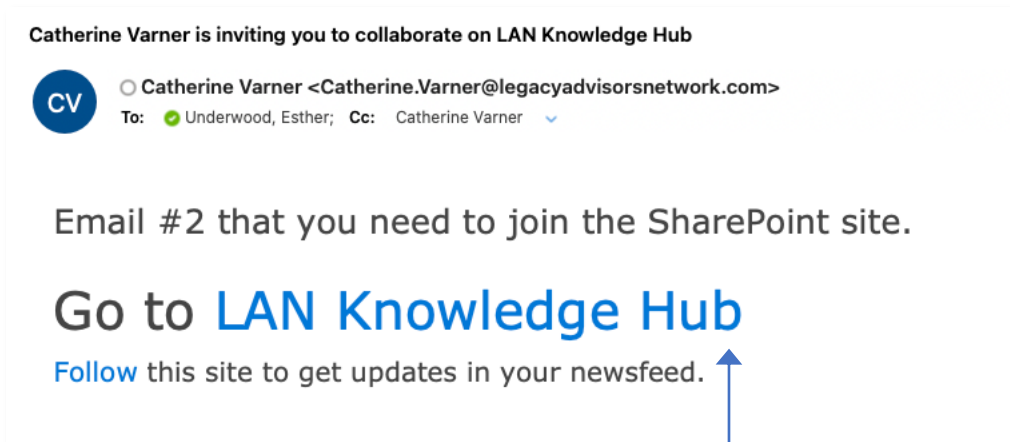
5. Click on “Next” and follow the instructions. **Do not wait to complete these steps or your session will expire and you will have to begin again.**

6. Ultimately, you will land on this App dashboard page. No apps will appear. It will look just like this. When you get here, you have finished part one of the process. Close this browser.



Follow These Steps for Part 2 of the Process

7. Look for your second email from Catherine Varner that looks like this:



Click on “LAN Knowledge Hub” and the SharePoint site will launch!

The page below shows you the LAN Knowledge Hub homepage.

If you do not arrive on the page below, contact Catherine for assistance via [email](#) or phone: 434.444.0130.

Using the LAN Knowledge Hub

The left side of the homepage has a view of the tools, which you can access off this main page or you can click **LAN Tools** and go the full view page.

LAN Knowledge Hub
Home **LAN Tools** Edit

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LEGACY ADVISORS NETWORK

Welcome! Our LAN Knowledge Hub is your one-stop spot for templates, documents, LAN marketing assets, strategic partner tools and more.

LAN Tools

Name	Modified	Modified By
BizEquity Tools	March 17	Catherine Varner
Capitaliz Tools	March 17	Catherine Varner
Committees	April 11	Catherine Varner
Fly-In Meetings	April 11	Catherine Varner
LAN Process Wheel	March 17	Catherine Varner
Market Insights - Small to Mid-Siz...	April 19	Catherine Varner
Onboarding Toolkit_New LAN Me...	March 17	Catherine Varner
Podcasts	March 17	Catherine Varner
Practice Enhancement Sessions	March 17	Catherine Varner
Small Groups	April 11	Catherine Varner
Tools to Manage Your Business	Yesterday at 6:27 AM	Catherine Varner
ValuCompass Tools	March 17	Catherine Varner

LAN Links

- Legacy Advisors Network Website
- My Glue App

Links to Customer Tools

- BizEquity
- Capitaliz
- ValuCompass

Link to MassMutual

- MassMutual Authorized Sign In

Click on the folders to find relevant files – templates, white papers, video & more.

The right-side buttons take you to key websites or logins so you can work more productively from this site.

You each can add files into the LAN Tools section to help us build a more robust site. You also may share individual folders and files as needed with people in your office, your LAN peers or a marketing team if you want to brand a document with your logo.

If you would like to provide access for office staff who support you to the SharePoint site, please email Catherine with their names and email addresses.