



Legacy Advisors
Network

Using the LAN Toolkit to Engage,
Connect & Accelerate Growth

LAN Tools: GlueUp

Engage with Your LAN Peers

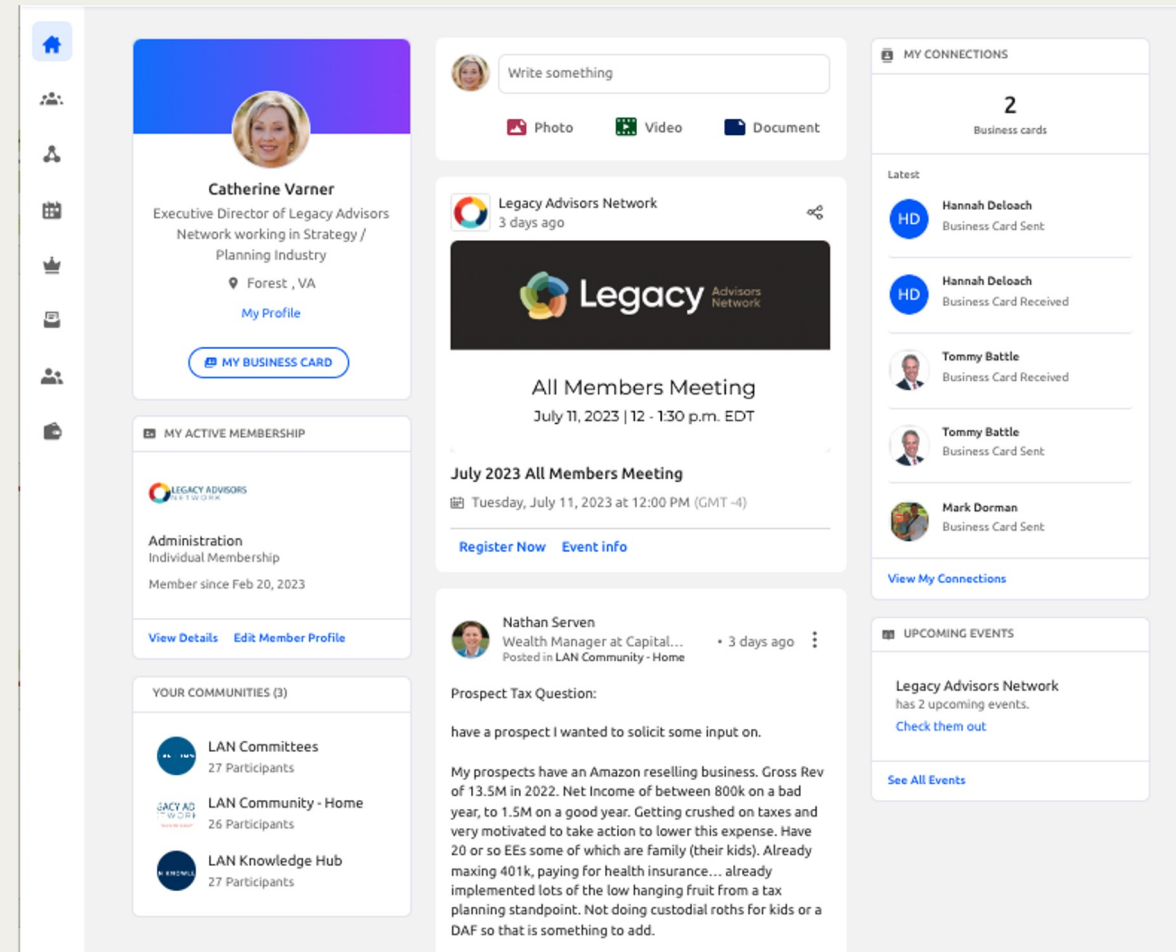
- Use the member directory
- Ask for input, best practices
- Share wins
- Use for Committee work

Register for Events

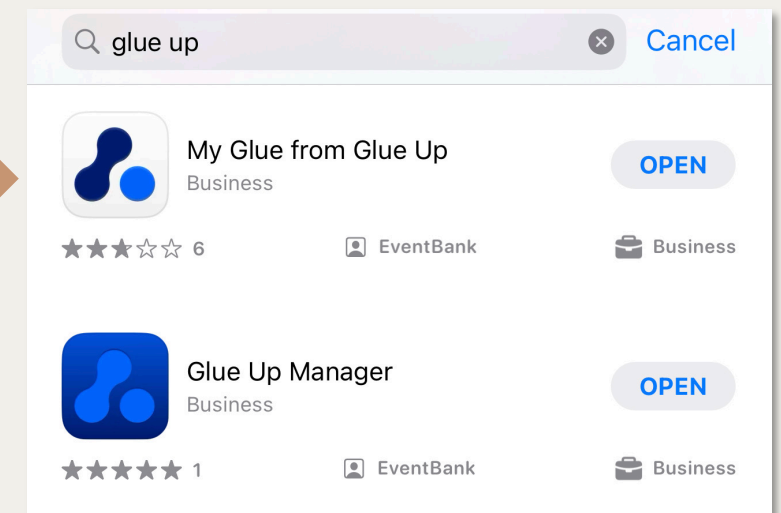
- Gain access to event links, agendas, documents

Billing / Payments

- Credit card auto-renewal
- Also may pay by ACH
- Renewal language



Download
the App



LAN Tools: GlueUp

Billing Autorenewal How To

Payment Method

Credit Card



eCheck / ACH



Check



Bank Transfer



Membership Renewal



Auto Renewal - Recommended

Your membership will be automatically renewed on a recurring basis. You can cancel at any time on your profile page. 

LAN Tools: Newsletter

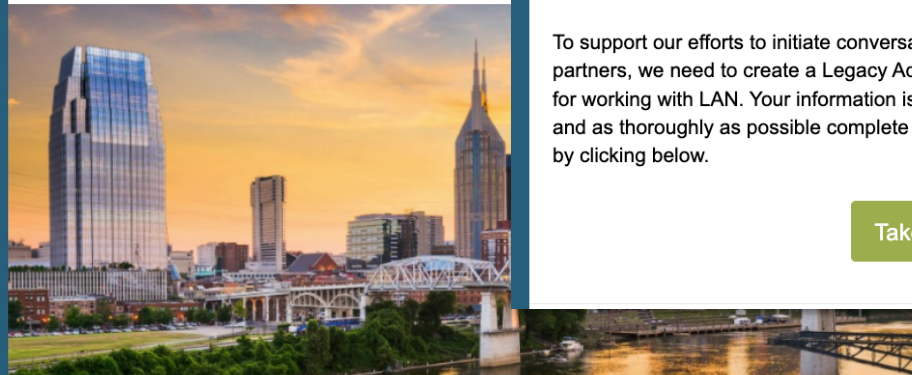


Hello! In this issue:

1. **Review the LAN Fall Fly-In Agenda & Speakers**
2. **Take a Very Important LAN Survey.** The Executive Committee created [this survey](#) that we ask each member (or firm) to **complete right away**.
3. **A Message to LAN Members from the Executive Committee**
4. **Note the update to the Practice Enhancement Zoom Meetings. Same time, new Zoom login.** Then make sure your schedule is free to attend our November 16 session.

See you in Nashville!

— Catherine



See You in Nashville in 7 Days!

We Need Your Response: Take the LAN Member Survey Now

To support our efforts to initiate conversations with national companies and potential partners, we need to create a Legacy Advisors Network profile that substantiates our case for working with LAN. Your information is critical to help us achieve this. Please promptly and as thoroughly as possible complete the survey developed by the Executive Committee by clicking below.

[Take LAN Survey](#)

Practice Enhancement Zoom Meeting Link Changes

Catherine is canceling the current Zoom invitation for PE meetings that you have on your calendars as we switch all LAN meetings to a new LAN Zoom account (and off the MassMutual Zoom platform). **Please delete the old series from your calendars and accept the new one for November—same time: the 3rd Thursday of the month. A series of invitations will follow for 2024.**



PRACTICE ENHANCEMENT
Join Us for Our Next Session

Join us **Thursday, November 16 from 1 - 2 p.m. EDT** with Bill Bishop, CEO of *The Big Idea Company* and creator of *The Big Idea Adventure*, an innovation coaching process that helps financial advisors grow their business by creating and packaging their one-of-a-kind BIG idea. Over the past three decades, Bill has helped more than 3,500 financial advisors build the future business of their dreams.

Come learn from Bill about how to get your audiences' attention, differentiate with a BIG idea, apply a tried-and-true process to win members ("clients"), avoid key mistakes, and, in doing so, grow your business with less hustle.

Registration now. Click on the meeting below

16
Nov

How to Sell a Lobster: A Unique, Hilarious, Insightful Look at 10x Thinking

LAN Tools: SharePoint



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

[See all](#)

+ New | Upload | Edit in grid view | Sync | Export to CSV | All Documents

Name	Modified	Modified By
Assessment Tools for Businesses - Discover Phase	June 15	Catherine Varner
BizEquity Tools	March 17	Catherine Varner
Capitaliz Tools	March 17	Catherine Varner
Client Processes & Planning Models	May 18	Catherine Varner
Committees	April 11	Catherine Varner
Fly-In Meetings	April 11	Catherine Varner
How Tos - Marketing & Selling to Business Owners	4 days ago	Catherine Varner
Market Insights - Small to Mid-Size Businesses	April 19	Catherine Varner
Onboarding Toolkit_New LAN Members	March 17	Catherine Varner
Podcasts	March 17	Catherine Varner
Practice Enhancement Sessions	March 17	Catherine Varner
Presentation Samples for Business Owner Workshops	June 15	Catherine Varner
Small Groups	April 11	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](#)

Tools on SharePoint



TOOLS TO RUN YOUR OBA BUSINESS

recommended by your LAN peers

The following tools are platforms LAN members are either using or interested in learning more about. This infographic captures a wide variety of tools designed to support your clients and your back office operations.

PRACTICE MANAGEMENT

Create efficient processes with workflows, project management, CRM, client tracking and team and client collaboration.

Monday
Asana
Hubly
Redtail
Pipedrive
Wealthbox

BUILDING FINANCIAL & TAX PLANS

Conduct comprehensive financial planning with interactive discovery processes and personalized, actionable implementation plans.

ValuCompass
Capitaliz
Asset+Map
FP Alpha
Wealth Building Cornerstone
RightCapital

Life-centered approach to discovery & planning:

ROL Advisors

Tax planning:

Holistiplan

Risk alignment, portfolio analytics and research, account monitoring & trading:

Riskalize

MARKETING & LEAD GENERATION

From creating and delivering a clear message to leveraging client-facing content for lead gen, check these out:

Messaging framework at MyStoryBrand.com

StoryBrand

Content & Lead gen platforms:

Advisor Stream

Snappy Kraken

Precise FP

The Value Builder System™

Easiest email platform + MM approved:

MailChimp

Video email platforms:

QuickPage

BombBomb

SendSpark

OneMob

Digital Business Card:

Popl

Best QR code generators:

Beaconstac

qr-code-generator

INVOICING & PAYMENT PROCESSING

For invoicing, billing and account management:

Payroc

Invoiced

FreshBooks

QuickBooks

For ACH, credit and debit cards and real-time payments:

Square

Stripe

Paylance

Authorize.net

CUSTOMER TOUCH

Create quizzes to engage customers and webinar attendees:

Kahoot

Estate planning & organization:

Nokbox

Legacy Letter Challenge

Learn Best Practices

Advisor Support

Client-Facing Content

Build a secure future.

Why You Need to Know the Value of Your Business.



Capitaliz

Business Insights Report

Presenter's Playbook

Key Lesson:

UNDERSTANDING YOUR BUSINESS AS AN ASSET

Extract the Full Value from Your Most Valuable Asset



A shift in perspective that increases business value from startup to exit.

Understanding your business as an asset is a fundamental idea that, when put into practice, helps owners extract maximum value from their business.

Most assets can be understood along 5 dimensions. Businesses are most commonly understood along only the first (1). These dimensions are:

- 1. Can produce income** - assets have the ability to produce income, which is easily measured
- 2. Monetary value easily known** - the monetary value of an asset can be understood in relation to similar assets in a given marketplace
- 3. Marketability easily known** - ability to sell the asset in its given marketplace is understood
- 4. Tied to personal financial goals** - assets are aligned with owner's personal financial goals and are a part of his or her personal financial plan
- 5. Current & future benefits quantifiable** - the benefits of an asset to the owner are understood in terms of how they serve the owner's unique needs now and into the future.

Unlocking 2 & 3 with the Discover Assessment

The **Discover Assessment** is a ValuCompass analytics tool that rapidly uncovers a business's enterprise value and potential value (2), giving the owner a reading of their business's monetary value, as well as its current and potential marketability (3).

Unlocking 4 & 5 with the Protect Assessment

The **Protect Assessment** tool from ValuCompass uncovers how a business aligns with an owner's personal financial plan (4). In doing so, it shows the present and future benefits of the business and how these benefits serve the owner's unique needs (5).

Getting full value from your business

On average, **the business represents 80% of an owner's net worth**. When the owner takes the time to understand the business as an asset along these 5 dimensions, they are able to extract more value from their already most valuable asset. Getting to know the business as an asset also helps when it's time to sell the business, transition ownership, and during other key moments in the business lifecycle.



Understanding your business as an asset is the crucial first step to extracting maximum value from your business.

Interested in learning more? Let's chat!

support@valucompass.com

LAN Tools: A New Website

Targeting our audiences

- Prospective members and business owners

Helping develop and accelerate your business

- In your market + gaining recognition among national brands

Driving engagement

- Clear calls to action, landing pages and marketing assets

Leveragable for LAN members

- Business owner content, imagery, landing pages



Bringing You New Services



payroc

Why partner with Payroc?

SINCE 2004, PAYROC HAS EVOLVED TO SUIT THE NEEDS OF THE EVER-CHANGING SMALL AND MEDIUM-SIZE BUSINESS OWNER.

Take advantage of our national footprint

700+

Employees & payment professionals

110k+

Clients & Partners

Over **\$39B** in processing volume

36 offices across the globe

Inc. 500 | **5000**



Omnichannel Payments


- **In-person** | Make complexity disappear and supercharge your business
- **On-the-go** | Our terminal offerings feature the latest capabilities for mobile payment acceptance
- **Online** | Maximize your revenue by expanding your business reach

Flat-rate Processing

Integration with QuickBooks

Bringing You New Services

∴ MassMutual



Worksite Confidently.

A closer look at the whole story:
Group Whole Life Insurance through your workplace

EMPLOYEE/MEMBER

MassMutual Group Whole Life

- Simply make the introduction to your small business owners.

Quest Benefits team does all the rest.

- You earn compensation for the referral.



Brought to you by
Quest Benefits NW

LAN Benefits Refresher

Strategic Partner

Benefit to You

CEPA (EPI)

CEPA Credentialing Program | \$2,300—a \$900 savings
Credentialed Plus Annual Membership | \$750—a \$145 discount

Capitaliz

\$3,800 to become credentialed and payable over 12 months |
Reflects a \$1,000 LAN discount

ValuCompass

Included in your membership dues | \$99/mo. (a \$196/mo. discount)

BizEquity

LAN covers the cost | \$150/mo. per account (retails at \$300/mo.)



Questions & Discussion

