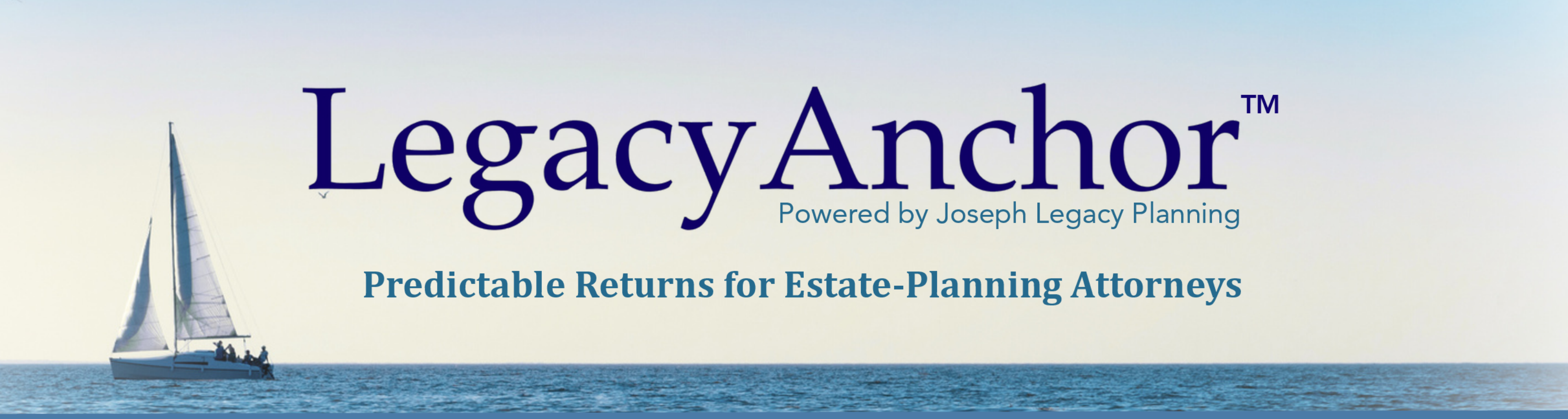

LegacyAnchor™

Powered by Joseph Legacy Planning

Predictable Returns for Estate-Planning Attorneys

Convert Your Practice into a Longterm Asset

You've spent years refining your craft, earning client trust, and building a successful estate-planning practice. Now, let LegacyAnchor convert that success into predictable, recurring income—without the headache of a complicated transition.

Powered by the innovative legal team at Joseph Legacy Planning (JLP), this program facilitates mutual representation agreements and direct offers to purchase full firms and areas of practice for qualifying attorneys; all tailored to the unique value of your existing client base, to ensure fiscal continuity for you and legal service continuity for them.

A Custom Offer for Every Qualifying Firm

No two firms are the same—neither are our offers. Each LegacyAnchor engagement is customized to reflect your unique client portfolio, practice size, and future plans. Our offers prioritize long-term alignment over short-term transactions, so that you can feel confident you're securing your reputation rather than selling it.

SAMPLE CASE: SOLO SHERYL

Five years into solo practice, Sheryl enjoyed estate planning for new clients, but keeping up with past accounts was stifling new business and growing her liability exposure faster than she wanted. LegacyAnchor offered a simple fix by designing a co-counsel arrangement to provide ongoing maintenance for existing client accounts. Now, after finishing each new estate plan, she hands off work to JLP for ongoing client support, plan updates, and maintaining compliance, while significantly reducing her risk. Today, instead of drowning in an ever-growing pile of clerical tasks, she collects recurring revenue for every co-counsel client account.

SAMPLE CASE: OWNER ORVILLE

After decades owning a boutique firm, Orville was ready to retire but felt nervous about losing his income. LegacyAnchor proposed an asset sale allowing him to transition his 5,000 estate planning client accounts, ensuring ongoing representation for them, with sale proceeds disbursed as recurring annual income for him. Now his clients receive expert legal care at JLP, while he collects longterm rewards for years of work well done.

SAMPLE CASE: MID-SIZE MIKE

Mike served as an estate-planner at a mid-size firm for ten years, but these accounts rarely produced enough business to justify his earnings. He introduced his firm's managing partners to LegacyAnchor, and they were able to outsource all their estate planning to JLP, allowing Mike to focus exclusively on higher returns from litigation.

574-213-2021

www.MyLegacyAnchor.com

The LegacyAnchor Process

1. Qualification & Assessment. After completing a simple online qualification form, you will receive a confirmation call to verify your current book of business, service structure, and active case load. This step ensures that your LegacyAnchor offer will reflect the true, sustainable worth of your client relationships, not just a one-time business valuation.

2. Offer & Agreement. If your practice qualifies, you will receive a personalized proposal offering purchase terms based on your client volume, complexity, and transition readiness. Each LegacyAnchor offer is built around you: your goals, your practice rhythm, and the client experience you have cultivated over time.

3. Transition & Communication. Our team will provide a step-by-step playbook to make onboarding effortless. We will agree on a jointly-managed and transparent communications plan, so that your clients experience the entire process as an extension of your trusted service—never a disruption.

4. Proceeds & Revenues. Subject to the transition terms, you will receive payment from JLP. These payments will reflect both the initial and ongoing value that you and your client relationships provide to JLP. This structure will be crafted to ensure that your legacy generates predictable income with minimal administrative burden or liability exposure.

5. Ongoing Relationship. LegacyAnchor offers can allow for continued ownership, professional identity, and active participation for attorneys who want it. Whether you remain in your own practice, amplify it through co-counsel, join JLP as counsel of record, or retire completely from practicing law—the decision is yours.

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Anchor Your Legacy. Secure Your Returns.

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