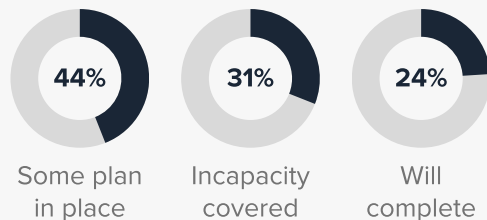


The exposure problem you already know

In 2026, **76%** of US adults have no will, **69%** have no incapacity documents, and **56%** have no estate plan of any kind. You mention the gap to your clients, but how many have acted to close it? They see the need, but most are still waiting; not because they don't care, but because no one has ever made it simple enough to get started. Most US adults decide to "get to it later" — and the majority never do.

Who Has a Plan?



ADD ESTATE PLANNING ACCESS TO YOUR SERVICE OFFERING

WHAT LEGACYKEY MEANS

FOR YOUR BUSINESS:



YOUR CLIENT SOLUTION, DELIVERED

No more referring clients out into thin air. Your own structured, attorney-backed pathway with your brand on the door and a licensed attorney inside. Clients get a real lawyer. You get a real solution to offer at scale.



CO-BRANDED VIRTUAL ACCESS

Your name on a personalized client portal, plus co-branded media materials done for you and ready to ship. Your clients can complete their foundational plan online: less than 90 minutes from first click to signed.



SIGNING MEETINGS AT YOUR OFFICE*

**By attorney arrangement only.* Signings may be hosted at your location, so clients can finish in the space they already know and trust. The attorney owns the legal side, while you contribute the welcome and the setting.



VISIBILITY FROM START TO FINISH

Your private tool dashboard shows every client you've introduced and exactly where they are in the process. Instant notification when clients engage and complete. You always see compliant status, never privileged detail.



GENERATIONAL CLIENT RETENTION

Estate planning is the only conversation that can place you in the room with the spouse, adult children, and named fiduciaries, years before the transfer that kills most generational client accounts.



NO ADDED TIME, COST, OR LIABILITY

The attorney handles all legal work and its liability. You pay nothing to use the program, give no legal advice, hold no legal documents, and touch no legal fee, while clients remain free to work with their attorney of choice.



WHAT LEGACYKEY MEANS

FOR YOUR CLIENTS:

★ ESTATE PLANNING ACCESS FROM HOME

A guided five-step process clients complete online in about an hour, with an efficient document signing meeting to conclude. Clients leave with a complete foundational plan (will, power of attorney, advance directive, and health care proxy) and opportunity for advanced planning as needed.

★ A REAL ATTORNEY — NOT A DOCUMENT MACHINE

Custom plans drafted by a licensed attorney in your area, plus full legal support from start to finish. Their professional judgment and malpractice coverage stand behind them. Not an anonymous template or software output, but an attorney coordinated with you around client best interests.

★ LEGAL COUNSEL FOR OPTIMAL OUTCOMES

The attorney offers ongoing legal representation to remain at the client's disposal through the inevitable changes of life (shifts in family dynamics, health care, employment, assets, tax law, industry regulation, etc.), so the plan can be kept current, compliant, and best positioned for client goals.

||| The Solution Is Clear:

Connect with a LegacyKey attorney to begin offering your clients complete, attorney-drafted estate plans through a co-branded pathway of your own. No added time, cost, or liability, with full visibility and coordination for service excellence.