



Own the engine that *grows your practice.*

Executive Summary of Attorney Membership in the LegacyKey Program: a productized referral-coordination method, trademark license, marketing suite, and multi-tenant operating system, in one flat-fee license.

The largest wealth transfer in history is underway, and the constraint on estate-planning firms is not legal skill, but process. LegacyKey productizes the part of the practice that has always run by hand: attracting the right clients, moving them from first contact to signed documents, and converting professional advisors into referral channels that compound. Your firm licenses the program once and runs it under your own name, with ongoing support. *LegacyKey never touches the legal work.*

THREE REASONS ATTORNEYS JOIN NOW

1

THE MARKET IS CONSOLIDATING

Get ahead of the “preferred attorney panel.”

Financial advisors and wealth-management networks are beginning to formalize “preferred attorney” panels, eclipsing every attorney not on one, and making them interchangeable vendors. LegacyKey flips the model by making your firm the **structured option advisors join**: with their own dashboard, their own client portal link, and closed-loop visibility on every referral. You are not competing for a seat on someone else’s panel — **you own the network infrastructure** for your market, with jurisdiction exclusivity available.

2

THE ENGINE

An all-virtual intake engine that adds clients, not hours.

Clients arrive through an advisor’s personal link and move through a guided, virtual, sequenced journey — **engage, learn, submit, sign** — with automated education and reminders carrying them to completed foundational documents at their own pace. The system handles the convincing, the chasing, and the back-and-forth; the attorney controls the process and prepares every document. Member firms report **90-95% of attorney time saved** on foundational planning engagements, and **2x monthly client engagements**.

3

THE CHANNEL

Advisors do your lead generation — you don’t lift a finger.

Every enrolled advisor has a live reason to raise estate planning with every client: it makes them the hero, deepens their client loyalty, and completes their own service provision picture. They introduce; the system tracks, notifies, and closes the loop; the relationship compounds. **No fee-sharing, no ad spend, no cold pursuit** — referred clients show up ready, educated, and self-selecting, inside real trust relationships.

THE MARKET THIS METHOD SERVES

\$124 trillion

set to transfer by 2048

76%

Americans with no will

56%

Americans with no plan at all

HOW IT RUNS

Three roles, one path — the attorney owns the law.

ATTORNEY

Anchors every plan.

Controls the intake and prepares all foundational documents. LegacyKey manages the education and communication around the legal work — never the work itself.

ADVISOR

Bridges the introduction.

Trusted professionals share their own personalized portal link with clients: a warm hand-off into a structured pathway, with constant visibility and zero fee-sharing.

CLIENT

Walks a seamless path.

Engages, learns, submits, and signs at their own pace right from home; guided and reminded at every step, with the law firm in control and available throughout.

EARLY RESULTS FROM LEGACYKEY FIRMS

90 sec

from initial inquiry to signed client

90-95%

attorney time saved on foundational plans

50%

engagement at one info night, vs. 2% average

10x

direct-mail exposure, at no added cost

2x

new client engagements in the first month

Figures from member firms and live pilot data. Individual results vary.

ONE LICENSE INCLUDES:

- ♦ **The Method** — the complete strategy architecture, published in the book *EFFORTLESS*
- ♦ **Trademark License** — run LegacyKey as your firm's own branded program
- ♦ **Multi-tenant operating system** — client journey, advisor dashboards, automated follow-up, CRM & PRM tracking
- ♦ **Marketing suite & training** — white-label collateral, recruitment guides, OS orientation, education, and more
- ♦ **Flat-rate monthly pricing** — annual term anchored to credential delivery; jurisdiction exclusivity by inquiry

EMPOWERING ATTORNEYS TO OFFER:



Online Estate Planning — A custom-branded, plug-and-play environment to give your clients instant online access to virtual estate planning at your firm.



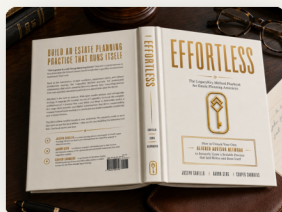
Rapid Market Capture — A first-mover position that locks in your firm as the go-to estate planning attorney in your market and beyond.



Self-Driving Referral Incentive — A mutual-benefit motivation structure that turns enrolled advisors into a standing sales force, sending clients your way and recruiting new advisors on your behalf.



Scalable Enterprise Value — A proven method where client volume grows independent of attorney hours, so every new engagement adds enterprise value instead of eating further into your calendar.



THE METHOD, IN PRINT

Effortless — the LegacyKey Method Playbook

By Joseph Cavello, Aaron Seng, and Cooper Saunders — The full architecture behind the LegacyKey program, with stories from the first attorneys to adopt it across the country.

AVAILABLE SEPT 8, 2026 · FREE FOR ATTORNEYS WHILE SUPPLIES LAST

NEXT STEPS

August 14, 2026

First screening of the method: premiere + live founder Q&A. Free for attorneys; space is limited

September 8, 2026

Public launch. *Effortless* publishes. Attorneys may claim a free copy while supplies last.

Exclusive membership

Want your jurisdiction locked to your firm? Inquire about EXCLUSIVE membership.

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