

## **What will the advisor learn from this presentation?**

The advisor will see that this presentation will add another option to their suite of products that they currently offer their clients and prospects either on an individual or employee benefit basis.

This presentation will offer the advisor another way of offering a value added during the financial and estate planning process. This segment will provide a further way to ensure that the client and their families continue to do business with them for years to come.

## **Presentation Overview**

This presentation will focus on industry-leading products, keeping on the pulse of members issues, and their needs. Our services are timely, and more relevant today than any other time.

Patricia will show you how to provide a value-added service for your portfolio of products for you to discuss with your clients and products.

She will discuss how Legal plans and Identity Theft plans are available for individuals, families and as an employee benefit add on for businesses.

## ***Why is Legal Shield Important for an Individual or Family?***

Many advisors should consider this benefit as an option to assist their clients and prospect during the estate planning process.

## **You will discover the following during the Fact Find and Know Your Client Interview**

- The clients do not have a will, nor do they understand the problems is they do not have one. If your client dies without a Will, their assets will have to go through the Probate process before being distributed to your family. That could mean years of delays and substantial taxes and fees.
- Many Canadians do not have a Power of Attorney that is necessary for them to be able to have their affairs taken care of when they can't look after them.
- More and more Canadians are creating Living Trusts to Protect their families as part of the estate plan for many reasons.
- Your clients and prospects might want to make their wishes known with an Advance Directive or Living Will. This is a very important legal document when it comes to making their wishes known regarding end-of-life decisions in advance in case they are ever unable to do so.
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This product can be the recommended solution for all the above problems at a fraction of the cost through conventional channels.

## ***Why is Legal Shield Important for the Business Owner as an Employee Benefit Add On?***

### **Has Your Client?**

- Had to hire or fire an employee?  
Had a dispute with a vendor or customer?
- Needed a lawyer to draft a letter or make a call to resolve a legal issue for you?

- Needed a lawyer to review a contract and provide advice?
- Been worried about their business getting sued?

All the previous situations involve legal issues that can have serious consequences for your business if they are not handled correctly.

**This presentation will also cover all the Corporate Information for you**

- A brief history of this 50-year company – established in 1972
- Industry disruptive company that is changing the way people access the law
- A review of IDShield.
- Dedicated support for your business: we can partner with you for convenience with minimal learning curve
- Looking for partnerships
- Attractive long-term renewal income