



**FREE CONSULTATIONS
ONLINE PLATFORMS
RESOURCES &
DISCOUNTS**

Make referring to Inter Vivos, PLLC easy and valuable. In order to reinforce the inherent value of meeting with a professional advisor prior to making important legal and estate planning decisions, we only offer free consultations and access to our best platform discounts to those clients who have been referred by an advisor referral partner.

Advisor discounts through our platform offerings average around 20 percent and can be as high as 50 percent, while an average plan review or initial consultation would normally cost a client 150 dollars.

By leveraging your relationship with us, your clients enjoy greater peace of mind, more value for the price of their plan, and access to features not available to the general public; thus making you the hero who made it all possible. Let Us Earn Your Client's Trust!

1425 South 550 East
Orem, UT 84097

Additional Offices:
AZ, CA, FL, ID, NV, UT, WA

Toll Free: 855.335.1060
Phone: 801.477.1570

www.intervivosplan.com



Let Us Earn Your Client's **Trust**



We Make You Look Good

GIVING YOUR CLIENTS THE VALUE AND SERVICES THEY DESERVE

At Inter Vivos our top priority is to reinforce and support your relationship with a client. As a result we encourage collaborative consultations with you present to best strategize for your client's needs. As we assist them in planning for their future we strive to keep you informed and involved in the process, and if any conflicts or doubts arise we will discuss them with you first before addressing them with a client. By reinforcing your recommendations and strategies for

other areas of their planning, we help clients strengthen their trust and dependence on you. Many of our Attorneys and support staff are also licensed to offer complimentary services as you need them, to ensure that your client's needs are being fully addressed without the risk that a client will seek out other advisors to assist them. By doing so, we keep the ball in your court and strengthen your role as their primary trusted professional year after year. Let Us Earn Your Client's Trust!



- Benefits to You**
- Heightened Image & Goodwill
 - Rewards Program
 - Point of Sale Referrals
 - Compensation for Funding
 - Learning Opportunities
 - Recognition Levels
 - Better Client Retention

WE PROVIDE SOLUTIONS

- ESTATE PLANNING
- ASSET PROTECTION PLANNING
- ADVANCED TAX PLANNING
- BUSINESS PLANNING
- NICHE MARKET PLANNING
- LEGACY PLANNING

solutions for every family's planning needs

PERSONALIZED CLIENT OPTIONS

We believe in providing a personalized experience for every client and in making the planning they need accessible for their pocket book, without compromising the value they receive. Personalized estate planning should be a priority for any of the following:

- Blended Families
- Special Needs Families
- Pre-Medicaid Applicants
- Business Owners & Investors
- Immigrants or Owners of International Assets
- Artists, Authors, Bloggers, and Inventors
- High Net Worth Individuals

EXCLUSIVE FINANCING OPTIONS

Unfortunately price often undermines a client's decision for proper planning. That is why we offer payment plans for advisor referrals to enable clients to afford the plan they really need without having to come up with totals up front. All financing is done internally and has a onetime fee, rather than accumulating interest.

ESTATE PLANNING CAN OPEN UP A WHOLE NEW WORLD OF STRATEGIES TO YOU

ADVISOR RECOGNITION PROGRAM

State Bar Associations and state law prohibit both compensation to non-attorneys for referrals and reciprocal referral relationships under most circumstances. However, there are many ways to



legally recognize advisors for their indispensable role in helping their clients find our services.

We have three levels of advisor recognition- Bronze, Silver and Gold. They each accordingly receive some or all of the following perks and benefits as made available:

- Branded Promotional Items
- Inclusion in Marketing Opportunities
- Sponsorships and/or Office Trainings
- Lunch Appointments
- Inclusion in Contests and Appreciation Events
- Advanced Marketing Kits
- Preference for Pro Bono Client Referrals
- Seasonal Recognition Gifts



- Benefits to Your Clients**
- Free Initial Consultation (\$150)
 - Financing Options
 - Access to Guru Platform
 - Quality Planning
 - Unified Comprehensive Advice
 - Additional Annual Follow Up



- Benefits to Your Business**
- Reinforcement of Strategies
 - Advanced Planning Options
 - Assistance in Closing Deals
 - Back Office Legal Support
 - Additional Marketing Materials
 - Regular Client Reviews

