Client Collaboration in a Secure Virtual Workspace

Create a multi-generational book of business.

Knowing Is Growing

Link provides advisors with data-driven insights that exist in their business. This visibility fosters decision making, sales, and optimal referrals.

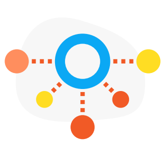
With Link, you can know:

- When client policies are uploaded, updated, and about to expire
- When clients view illustrations and complete applications
- A more comprehensive picture of client portfolios
- The client's family, friends, and associations

> **"Almost 80% of advisors see digital as helpful for marketing and client acquisition and engagement."**
>
> *— "Consumer Expectations Drive Advisors to Rely More on Digital Tools," LIMRA, June 2019*

Connectivity Expands Your Capabilities

When interactions, documents, data, and processes of clients and partners are consolidated into a single platform, you can use these to drive an entirely new level of sharing, collaboration, service, security, and sales.

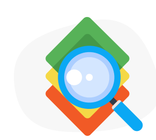


Share Anything, Anytime

Secure digital information can effortlessly be added, organized, searched, filtered, and shared among all parties.

Collaborate with Everyone

Streamline the conversation among your clients, their family and friends, and all partners involved in the process.



More Client Discovery

Insights and notifications about a client's financial needs and portfolio gaps help you make timely recommendations that uncover more sales.

Connect and Collaborate with Ease

Link equips you with a comprehensive digital toolkit to communicate with clients and their team of friends, family, and professionals as they share and upload policies and financial records. Comment threads, notifications, and alerts keep everyone informed.

Store Policy Data

- Upload supporting files securely
- Add detailed information
- Include comments and notes

Share with Ease

- Give clients instant access
- Manage sharing permissions
- Collaborate on shared files in real-time

Respond Fast with Alerts

- Get notified when clients view or share files
- Receive alerts the moment comments and requests are submitted

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“Over 66% of children fire their parents' advisors. ”

- Anna Robaton, "Preparing for the $30 trillion great wealth transfer," CNBC, 11/30/16

Switch On the Power to Grow Sales

Collaboration with your clients and partners on the Link platform delivers sales opportunities that are unattainable in decentralized workflows that rely on separate CRM, encrypted email, texting, and consumer file sharing services. Data-driven referrals, recommendations, and alerts based on client activity equals scaleable sales.

Capture Multi-Generational Clients

Link helps you bridge second-generation clients by building trust and creating lasting relationships.

End Encrypted Email Frustrations

Link keeps you compliant and your clients’ information safe by replacing encrypted emails with in-platform communication and transactions.

Drive Efficiency

Use Link to establish a unique workflow that fits you and all your collaborators with modern, reliable, and efficient processes.

Generate More Prospects

Uncover your clients’ best referrals automatically and access their contact information to communicate with them right inside Link.

Create Loyal Clients

Exceed client expectations by offering digital services that make it easy for them to manage the business side of their lives while securing their future.

Contact us to get started today:

Email **sales@legacyshield.com** or visit **www.legacyshield.com.**