

# For Financial Service Professionals

## **As an Independent Heritage Agent you will enjoy these additional benefits**

### **More Income...**

- You will get paid for making Living Trust sales.
- You may find additional needs once your client discloses all of their finances while funding the trust.
- You will find that clients are much more apt to give you more trust referrals than insurance referrals.
- More referrals means more business, more business means more income.
- You have a new valid reason to re-contact your existing clients for additional services.
- You have a brand new market to sell in.
- There are instant commissions with no underwriting and no charge-backs.

### **More Control...**

- Instead of referring your clients to a local attorney that may or may not have your best interests in mind, you get to help and maintain control of your client and earning income while you do.
- Your clients already trust you and would rather have you help them solve their problem than an attorney they do not know.

### **More Professional...**

- You now provide something that your competitor doesn't. You now have a competitive edge.

**Heritage Living Trust is not in competition with you. Heritage Living Trust holds no insurance or securities licenses and does not engage in the selling, solicitation, or promotion of insurance or investment products. Heritage will never disclose your client's information to anyone. Heritage supports you...never competes with you.**

