Membership Benefits

Wealth Solutions Network

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Mindset Level Members receive the following benefits

01

A community of like-minded attorneys dedicated to personal growth and collaboration.

We are developing a dynamic community of attorneys united by a passion for personal growth, ethical excellence, and collaborative synergy. We foster professional development, mentorship, and networking, creating a supportive environment where legal professionals thrive and work together to benefit clients, the legal field, and their broader communities by providing financial leadership and guidance.

02

Cross-referral opportunities for legal services through the network.

Within our network, members have a valuable opportunity to give and receive referrals for legal services. By connecting with fellow attorneys who share our commitment to excellence and ethics, we ensure that clients receive top-notch representation while expanding our professional reach. This reciprocal referral system strengthens our community and enhances our collective success.

03

Monthly Print Newsletter with referral letter template to grow your business.

To help you build referral networks, each month, you will receive 11 copies of The Advocate's Odyssey. This newsletter is designed to inform you and potential referral sources of the problems that you can solve through your affiliation with WSN. This newsletter delivers valuable practice improvement, marketing, personal development, and financial information. We also provide a templated letter for you to share with ten potential referral sources to build your business.

04

On demand training sessions on core principals of financial advocacy.

WSN offers on-demand training on the core principles of financial advocacy, empowering members to excel in their legal practice by delivering exceptional value to their clients. These courses cover financial planning, asset protection, cash flow management, tax planning, and investment strategies. Members can access these resources conveniently to learn at their own pace. Additional training and education will ensure you stay up to date with essential financial knowledge to serve clients better and enhance their financial well-being.

05

As needed access to vetted solution providers to implement for clients.

For those members who do not wish to ascend to the Skillset Level or Toolset Level, you will have access to a curated selection of vetted resources and financial professionals (including other WSN Members who have ascended to those levels) to support the integration of financial advocacy into their legal practice. These resources may include insurance agents, investment advisors, and specialized software tools. By offering these trusted resources, we enable our members to streamline their work, improve client service, and excel in their legal endeavors, ultimately enhancing their professional success.

06

Membership recognition and promotion package.

WSN will provide you with a license to the WSN logo, eligibility for a membership spotlight in The Advocate's Odyssey, a press release, and other promotional items to kick-start your referral process and differentiate your business in your market.

07

Licensed marketing materials to inform and educate.

WSN will provide a license to use a growing library of consumer-oriented marketing materials to differentiate you from your competitors, promote solutions for your clients, and help you generate more leads.

08

Invitation only trainings with industry experts to build your understanding of core planning principals.

WSN offers exclusive, invitation-only training featuring industry experts to deepen members' understanding of core planning principles. These sessions provide unique access to insights and strategies in areas like financial planning, estate planning, and tax mitigation. By connecting members with top experts, we ensure their continuous growth and expertise in serving clients with the highest standards of professionalism and knowledge.

Skillset Level Members receive all of those benefits, and....

09

Licensed access to turnkey solutions

Skillset Level Members do not have to learn all the nuances of financial planning to get started. You can confidently and competently provide solutions to their clients right away by using our turnkey solutions. We provide ready-made tools and resources to streamline the incorporation of financial planning into their legal practice.

These solutions may include software, templates, or proprietary databases to simplify cash flow management, risk assessment and portfolio review, and tax and insurance planning. Your WSN mentor will collaborate with you in using these solutions until you are confident and proficient in using these tools.

These programs leverage the latest technology to allow you to provide these services without years of experience and the addition of more staff.

10

Licensed access to turnkey marketing programs

Skillset Level Members have licensed access to turnkey marketing programs, providing members with ready-made tools and strategies to enhance their legal practice's visibility and client acquisition efforts. By granting authorized access, we empower our members to market their services effectively, expand their client base, and differentiate themselves as financial advocates.

11

Lead generation programs

WSN provides Skillset Level members access to highly effective lead-generation programs, empowering them to grow their client base and business. These programs may involve strategic partnerships, referral networks, and digital marketing initiatives designed to attract potential clients actively seeking legal and financial services

12 Qualification for AdvocateAccess Legal fee compensation program

Our revolutionary AdvocateAccess Legal Fee Payment Program supports attorneys in conducting crucial meetings with clients and mentors. Each member at the Skillset level can receive $500 per eligible client to cover their legal fees for two essential meetings:

Initial Discovery Meeting

In this meeting, attorneys and their clients engage in the initial stages of the financial planning process. They discuss the client's needs, goals, and their current financial situation. This meeting lays the foundation for the advisory relationship and helps identify critical financial issues.

Second Strategy Meeting

After the initial discovery meeting, the attorneys, their WSN mentor, and their clients reconvene to strategize and plan the proposed financial solution. This meeting involves a deeper dive into the proposed solution and the financial products applicable to develop the plan for moving forward.

A mentor from our community will participate in these meetings to provide guidance and expertise. This mentorship enhances financial advice quality and helps less experienced financial advocates gain valuable insights.

The $500 financial support eases the financial burden on attorneys and their clients, enabling them to focus on providing counsel and strategizing without being hindered by initial meeting costs. This program underscores our commitment to fostering professional growth and collaboration within the community, ensuring that attorneys have the resources needed to provide exceptional service to their clients.

13 Qualification for AdvocateAware Marketing fund program

With our revolutionary AdvocateAware Marketing Fund Program, each Skillset level member has an individual fund to allocate a portion of their pre-licensing earnings for future marketing expenses. This dedicated fund provides financial resources tailored to each member's needs, supporting branding, advertising, and promotional efforts. Members can access their AdvocateAware fund, guided by transparent guidelines and expert support.

This program ensures that every Skillset level attorney can strategically invest in marketing, enhancing their practice's visibility and long-term success while benefiting from the community's collective wisdom. At the same time, they work toward licensing at the pace their lifestyle allows.

14 Sixty-minute one-on-one on-boarding and coaching sessions

Our sixty-minute one-on-one onboarding and coaching sessions are personalized, in-depth meetings designed to support individuals in their professional journey. During these sessions, your WSN mentor provides focused guidance and training tailored to your current business's specific needs and goals.

The sessions cover various topics, including skill development, goal setting, problem-solving, and strategies for success. Participants receive direct feedback, actionable advice, and a safe space to discuss challenges and aspirations. These sessions aim to accelerate personal growth and foster confidence and competence in the individual's chosen field, promoting long-term success and fulfillment.

As a result of your first two sessions, you and your mentor will develop a 120-day action plan identifying the three core opportunities that exist in your current practice and the specific steps to take to experience a positive return on investment within 120 days and establish the path to generate at least a 10x return on investment within 365 days.

15 Monthly Open office coaching and training sessions

Our Monthly Open Office Coaching and Training Sessions are dynamic and accessible learning opportunities. These regularly scheduled sessions are open to all Skillset level members and provide a platform for interactive coaching and skill development.

In these sessions you will get:

Accessibility
All members are invited to participate, fostering inclusivity and engagement within our community.

Coaching
Expert coaches or mentors lead the sessions, offering guidance on various topics such as financial planning theories, investment planning, marketing, business management, career development, and personal growth.

Training
The sessions encompass practical training exercises, discussions, and workshops, allowing attendees to actively learn and apply new knowledge.

Interactivity
Participants have the chance to ask questions, share insights, and collaborate with peers, creating a supportive and collaborative learning environment.

Continuous Improvement
These monthly sessions encourage continuous improvement and skill enhancement, helping our community members stay at the forefront of their profession.

Networking
Attendees can connect with fellow legal professionals, facilitating networking and the exchange of ideas and experiences.

In summary, our Monthly Open Office Coaching and Training Sessions are a cornerstone of our community, providing an inclusive platform for ongoing learning, coaching, and collaboration among our members, ultimately promoting professional excellence and growth.

Toolset Level Members receive all those benefits, and....

16 Guidance and Direction for Licensing and Registration.

We will provide detailed **step-by-step instructions** on all aspects of the training and testing needed to fulfill your regulatory requirements to become licensed as an insurance agent, investment advisor, or both.

17 Complete back-office solution

We empower WSN Toolset level members to provide insurance solutions and asset management through our complete back-office solution. Toolset members deliver comprehensive and client-focused financial services, ensuring their clients' well-being and financial security by leveraging the collective strength and resources of the community to generate both increased up-front and recurring passive income.

Our comprehensive back-office solution empowers community members to better serve their clients by providing access to a network of trusted insurance providers and first-class asset managers through our affiliated registered investment advisory firm and insurance agency. You do not have to search out companies that may be willing to accommodate you as an agent and navigate the regulatory issues associated with becoming an investment advisor or an investment advisory firm.

We take care of all of this for you with the industry's only insurance agency and registered investment advisory firm built by an attorney, run by attorneys, and designed from the outset to meet the unique needs of attorneys who wish to provide these services as an add-on to their existing legal practice.

Here's how it operates:

Client-Centric Insurance Access

Members can connect their clients with reputable insurance providers, ensuring they receive tailored coverage options for life insurance, long-term care insurance, annuities, and more.

Client Asset Management

Through our community, attorneys can access top-tier asset managers specializing in client-focused investment strategies. This access enables members to offer their clients expert advice and portfolio management services to help grow and protect their assets.

Efficiency in Operations

Our back-office solution streamlines administrative tasks for attorneys, allowing them to dedicate more time and resources to providing exceptional legal services and financial guidance to their clients.

Commission Revenue

You will receive a commission upon selling insurance-based products. We pay commissions based on industry standards for the products, the type of product sold, the overall level of production, and the amount of participation by mentors from WSN. You will receive a more significant percentage of the total commission paid by the insurance company as you become more proficient and need less planning assistance from your mentors.

Client Wealth Building

Asset management services empower attorneys to assist clients in achieving financial goals and wealth building by providing strategic investment and financial planning recommendations that align with their client's long-term objectives. Through WSN, you will have access to industry-leading investment platforms such as Fidelity and Schwab and best-in-class institutional money managers to have confidence that you are providing your clients with asset management services. Once properly licensed, you will participate in monthly recurring revenue from asset management fees.

Informed Client Decisions

The community offers expert guidance and resources to help members make informed decisions about insurance and asset management for the benefit of their clients, enhancing their overall client service offering.

Errors and Omissions Coverage

For an additional fee, we will provide appropriate errors and omissions coverage for your approved activities as an insurance agent or investment advisor representative of our affiliates.

Leadership Level Members receive all of those benefits, and....

18 Software solutions (Tech Stack) to implement.

WSN offers a comprehensive suite of software solutions tailored to provide financial planning services. These tools include financial planning software, investment analysis platforms, wealth management systems, and risk assessment applications. These solutions streamline financial operations, enhance investment strategies, and improve risk management.

Designed to meet specific financial planning needs, they empower our members to deliver exceptional financial services, stay informed with up-to-date financial information, and efficiently manage their financial planning practices in today's dynamic economic landscape. We will provide these tools for you and teach you how to use them.

19 Enhanced sales and financial planning training.

We designed WSN's enhanced sales and financial planning training for members aspiring to take on mentorship or leadership roles within our community and generate additional revenue by collaborating with members at the Mindset, Skillset, and Toolset levels. This program offers a structured curriculum and mentorship from seasoned professionals to help members achieve this goal.

Key features include:

Advanced Training Modules

Members gain access to specialized training modules designed to empower them to serve as a mentor to their peers. These modules cover client acquisition, advanced insurance planning, tax planning, portfolio management, and effective mentorship.

Personalized Coaching

We pair each participant with an experienced mentor who provides one-on-one guidance and support. These mentors offer insights, share their expertise, and help members navigate challenges to mentorship or leadership.

Case Studies and Practical Exercises

Participants engage in real-world case studies and exercises, applying their knowledge to complex scenarios. This practical experience hones their skills and builds confidence.

Peer Learning

Group discussions and peer feedback sessions foster a supportive learning environment where members can exchange ideas, share experiences, and learn from each other's successes and challenges.

Certification

Successful program completion may lead to a mentorship or leadership certification, demonstrating expertise and commitment to the community.

Ongoing Support

Graduates of the program receive ongoing support and resources as they transition into mentorship or leadership roles, ensuring their continued success.

This program equips members with the knowledge and skills needed to excel in sales and financial planning and prepares them to mentor and lead others effectively within our community. It represents a significant step toward elevating members to mentorship and leadership positions, enhancing the overall professional growth and collaboration within the community, and providing the opportunity for collaboration and revenue sharing.

20 Enhanced sales and financial planning training.

Our Regional Exclusivity and Membership Control Program allows leadership-level members to lead and shape the community's growth in their designated geographic region. This limited opportunity is available on a first come-first served basis.

Key program components include:

Regional Exclusivity

WSN grants members in this program exclusive rights to represent our community within their specified region, ensuring they have a unique presence and influence in that area.

Admission Control

These members control the admission process for new members within their region. They can vet potential members based on shared values, professional standards, and collaboration potential.

Mentorship and Guidance

Program participants receive mentorship and guidance on effectively managing the community in their region. This program includes strategies for growth, conflict resolution, and member engagement.

Community Expansion

Members can actively expand the community within their region by identifying legal professionals who align with the community's mission and values. They can facilitate onboarding and integration and share revenue from their efforts.

Networking and Collaboration

Exclusive regional members have enhanced networking opportunities, enabling them to foster collaboration and partnerships with local legal professionals, bar associations, and other relevant organizations.

Regional Events

The program supports organizing regional events, such as seminars, workshops, or conferences, to strengthen the community's presence and impact.

Reporting and Accountability

Participants in this program provide periodic reports on their activities and progress, ensuring transparency and accountability in managing their exclusive area.

Community Support

The program offers ongoing support from the community leadership to equip members to manage and grow the community in their region effectively.

Compensation override

You will earn compensation on revenue generated by members that you have recruited into the network as well as the other members assigned to your region.

This program empowers members to become community leaders in their regions, fostering growth, collaboration, and professional development while ensuring a consistent and high-quality experience for all members in their exclusive geographic area and provides the opportunity for tremendous financial growth opportunities.

Summary table

Membership Benefit	Membership Level: Mindset Level	Skllset Level	Toolset Level	Leadership Level	Estimated Annual Value
A community of like minded attorneys dedicated to personal growth and collaboration	Included	Included	Included	Included	**$2,500.00**
Cross-referral opportunities for legal services through the network	Included	Included	Included	Included	**$5,000.00**
Monthly Print Newsletter with referral letter template to grow your practice	Included	Included	Included	Included	**$2,500.00**
On demand training sessions on core principals of Financial advocacy	Included	Included	Included	Included	**$1,788.00**
As needed access to vetted solution providers to implement for clients	Included	Included	Included	Included	**$5,000.00**
Membership recognition and promotion package	Included	Included	Included	Included	**$2,500.00**
Licensed marketing materials to inform and educate	Included	Included	Included	Included	**$5,000.00**
Invitation only trainings with industry experts to build your understanding of core planning principals	$ 149 per training	Included	Included	Included	**$997,00**
Licensed access to turnkey solutions		Included	Included	Included	**$7,200.00**
Licensed access to turnkey marketing programs		Included	Included	Included	**$25,000.00**
Lead generation programs		Included	Included	Included	**$5,000**
Qualification for AdvocateAccess Legal fee compensation program		Included	n/a	n/a	**$2,000.00**
Qualification for AdvocateAware Marketing fund program		Included	Included	n/a	**$25,000.00**
Sixty-minute one-on-one on-boarding and coaching sessions		3	12	24	**$3,000 - $24,000**
Monthly Open office coaching and training sessions		Included	Included	Included	**$25,000.00**
Complete back office solution and access to our network of:			Included	Included	**$20,000.00**
Insurance Providers			Included	Included	**$10,000.00**
Asset managers			Included	Included	**$10,000.00**
Software solutions (Tech Stack) to implement		additional	additional	Included	**varies**
Eligibility for Leadership Counsel which provides:				Included	**incalculable**
1. Serve as mentor providing support opportunity for and fee share with other members with enhanced sales and finacial planning training				Included	**$12,000.00**
2. Have the opportunity for Regional Exclusivity and control				Included	**incalculable**
3. Fee override with own recruits/agents				Included	**incalculable**
Estimated Annual Value	**$25,285.00**	**$101,485.00**	**$190,485.00**	**$200,000.00 and up**	
2024 Single Pay (12 months)	$897.00	$2,997.00	$6,497.00	$8,997.00	
2024 Monthly Pay		$275	$595	$825	

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