



“Our exclusive program provides direct access to individuals navigating estate planning decisions through collaboration with our extensive network of attorneys”.
(Founder, Jesse A.)

The 4 Step System



Prospects Generated

Discover how we can fill your calendar with prospects ready to discuss estate planning through our partnership with UpCouncil.



Protected Territories

Qualify for exclusive rights to your territory, eliminating prospecting concerns.



Turnkey Appointments

Learn to fill your calendar with quality appointments for the ENTIRE MONTH!



Collaborate with Hundreds of Attorneys

Attorneys provide expert legal insights and guidance, enhancing the planning process. We have access to hundreds of attorneys!



Building Relationships with the Next Generation

Foster trust with the next generation of clients, ensuring a smooth transition of wealth management responsibilities.



Maintaining Control of Client's Experience

Keep control over client relationships while leveraging our expertise to enhance service quality.



Instant Infrastructure

Enjoy a **100%** done-for-you solution; no need to invest in technology or hire new staff. **WE HANDLE IT ALL!**



All prospects come directly from attorneys, our UpCouncil partnership, or website. Additionally, we provide a Client Education Library and regular Newsletters, empowering clients with knowledge about estate planning and wealth preservation.