



# CRM-AMS PLATFORM

*A unified platform for agents and agencies to manage leads, clients, and policies with ease. Track production, stay organized with dashboards, and run your business from one simple, powerful system.*



## Agents:

- ✓ Lead, client & policy management
- ✓ Tasks, notes & reminders
- ✓ Mobile-friendly dashboard
- ✓ \$34.99/month  
(Free for producers earning \$5K/mo)

## Agency:

- ✓ Full team & agent visibility
- ✓ Client & policy oversight
- ✓ Production tracking dashboards
- ✓ \$39.99/month

**Legacy is more than an upline — we partner with agents and agencies to build long-term success. From expert support to modern technology, our goal is to help you write more business, stay organized, and grow with confidence.**

## Contact Us:

- 248-461-3360
- [partners@legacyagents.com](mailto:partners@legacyagents.com)
- [LegacyAgent.com](http://LegacyAgent.com)