

Protecting the
Future of Your
Home and
Family's
Guaranteed!

Holistic
Financial
Planning

“Great News”

“Great Solutions”





Introduction

- At Legacy, we specialize in protecting your home and family by offering reliable and affordable solutions.
- Our goal is to ensure your loved ones can stay in their home and remain financially secure during life's unexpected events. This is just one of the many solutions we provide to safeguard your family's future.
- You'll be very happy we've met today





Your Priority: Family Protection

“Knowledge is Power”

- To address your concerns, you reached out because protecting your family by ensuring your mortgage is paid off in the event of an unexpected tragedy is a crucial priority for you.
- Prepare for the unexpected because anything that can go wrong, might go wrong. Ensure your family is protected no matter what.



Why Choose Us?

We understand that you may have received multiple calls and offers from other agents. You answered our call and agreed to meet with us, which shows your commitment to securing your family's future.

Beyond Mortgage Protection

We offer a comprehensive approach to your financial well-being, including:

- **Debt Reduction:** Helping you manage and reduce your debt for a more secure financial future.
- **Early Mortgage Payoff:** Strategies to pay off your mortgage early without adding more bills.
- **Retirement Planning:** Assisting you in achieving the retirement you deserve with tailored plans.
- **Tax Reduction:** Providing strategies to reduce your taxes in retirement, ensuring you keep more of your hard-earned money.

Other agents will only write up your mortgage protection program, collect their commission, and you'll never hear from them again.

That's not what we do. We'll be your financial professionals, providing solutions to help you realize your dreams.



We Understand Your Concerns

Life is Hard Enough Already

- **Avoid the Stress of Moving:** Losing a loved one is hard enough without the added burden of packing up and moving to a new home.
- **Keep Your Kids in Their School:** We understand you want to keep your children in their current school, where they have established friends and routines.
- **Stay Close to Your Community:** The support of familiar neighbors and a close-knit community is invaluable during tough times. We don't want you to lose that.
- **Prevent Disruption:** Ensuring your mortgage is protected means you won't have to uproot your family and start over, hoping to find a supportive environment again.





Why Mortgage Protection?

The main reason for mortgage protection is to ensure your family can stay in their home if something unexpected happens. We never know when something is going to happen. These programs provide your family **options**.

To accomplish this, mortgage protection is funded through a life insurance plan.

Three Areas We Need to Cover with Life Insurance:

- 1. Final Expenses:** If there's one sure thing in life, it's that none of us get out of this alive. We get one go-around.
- 2. Job Site Insurance:** Everyone should get as much as they can, as it's designed to replace our income. This is also why we cannot take the policy with us when we leave the job or retire.
- 3. Mortgage Protection:** This is why we're talking today – to protect our family by paying off or paying down our mortgage so our families can stay in the home we're building.

Mortgage Protection is that Solution

- Mortgage protection ensures your family has **options**
- Pay off the mortgage in one lump sum. We all know Job site insurance is never enough
- Make monthly mortgage payments
- Fix up the existing home to sell
- Use funds for a down payment on a new home
- Use the Cash Value to pay off your mortgage early and be your own bank





Personalizing Your Protection Plan

Understanding Your Health for the Best Plan

We've discussed why mortgage protection is crucial for securing your family's future and how it provides the peace of mind you need. Let's go over some details to find the best plan for you.

To do this, I need make sure you qualify, and understand your current health status:

- Do you have any existing health conditions?
- Are you currently taking any medications?
- Have you used tobacco in the last 12 months?

This information will help us determine the most suitable and affordable protection plan for you.

99% are Effortless Applications

- No Medical Exams - No Blood - No Urine



Your Plan

- The plan is simple and straightforward.
- Life Insurance benefits are tax free.
- The best News...it's Affordable and worth it.



Congratulations!

Here's what you can expect once the carrier gives final approval:

- Your rate will never go up during the policy term.
- Your policy can't be canceled because of age or health.
- Your coverage starts on day one.
- Your new policy will now protect your family's home and future.



Future Planning

Before we wrap up, I have a few quick questions about your retirement plans:

- Have you started planning for your retirement?
- Do you have any specific financial goals for your retirement?
- Are there any concerns you have about your financial future?

These are important aspects to consider. Either myself or a member of my team may call in the future to discuss this further with you.





Sharing the Benefits



Do you know anyone else who might benefit from learning about mortgage protection and our services?

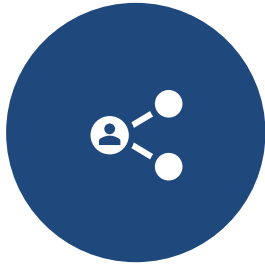


Who else in your network would appreciate the peace of mind that comes with our protection plans?

"The highest praise we can receive is a referral from a satisfied client and trusted friend. These introductions are invaluable, enabling us to assist others effectively and ethically while helping their families thrive. Thank you for your continued support and for spreading the word!"



Thank You



THANK YOU FOR YOUR
TIME. I LOOK FORWARD
TO WORKING WITH YOU.



HAVE A WONDERFUL DAY
AND I WILL CHECK IN WITH
YOU IN A FEW DAYS.

Legacy Secure

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