



WORKING WITH LSPN

1: REGISTER WITH LSPN

1. Go to www.LSPNDIRECT.com
2. Click on Registration Tab
3. Fill out our Registration Form
4. If Securities Licensed- Fill out the OBA form
5. Register for Payment Portal to receive payments via our provider GigWage.

2: REFER YOUR CLIENTS

1. Go to www.LSPNDIRECT.com
2. Use the LSPN Appointment Tab
3. Fill out the form to schedule an appointment
4. This ties the client to you (for payment) and places them into our appointment queue.

3: SELECT THE APPOINTMENT TYPE

1. We have 2 options. ON-DEMAND or Scheduled Appointment.
2. Option 1 ON-DEMAND: Is your client ready to meet? You can now meet with a Legal Professional ON-DEMAND from 8am-4pm PST.
3. Option 2 Scheduled Appointment: If you would like to submit the client for a future date/time. select option 2 and fill out the form.

www.LSPNDIRECT.com

Office: (855) 355-1060

ASSISTED TRUST PLAN

\$997

- For Simple Estates
- Professional assistance for your clients to help them with every step of their plan
- Provides free deed preparation for moving home into a trust
- Provides free mobile notary to come to your client's location
- Includes pour-over will, financial power of attorney, and healthcare directives

CUSTOM PLANNING OPTIONS

(Pricing Varies)

- Advanced tax planning, asset protection planning, international planning, legacy planning, and special needs planning
- Custom-designed plans by experienced estate planning attorneys
- Innovative solutions for complex cases
- Available in every state and ten different countries LSPN staff works with agents during consultations to help promote the agent's financial solutions to their clients

SCHEDULE A WORKSHOP

1. Go to www.LSPNDIRECT.com
2. Click on SCHEDULE A WORKSHOP option to make the appointment
3. Topics Include: Basic Estate Planning, Incapacity Planning, Tax Planning, Business Planning, International (Immigrant Planning), Special Needs Planning, Legacy Planning