InKnowVision® Capabilities

Every client engagement is important to us. Every case receives the support you need. We work until you are satisfied. How do we do it? Read on.

Our background

We are the leading back office case design firm in the country for families whose net worth exceeds $10M.

Our specific capabilities

1. **Analysis -** We analyze financial statements, tax returns, existing estate planning documents, business documentation and existing life insurance policies summarizing the existing situation and also looking for:
   - **a.** Documents problems and documents that do not accomplish what the client wants
   - **b.** Underperforming or inappropriate life policies
   - **c.** Incorrect asset ownership
   - **d.** Income tax issues, and
   - **e.** Estate tax issues

   Important to you: You save your time and money by allowing us to do all of the back office analysis and provide you with an objective, consistent and easy to present report.

   Important to your client: Your client has the benefit of knowing exactly where they stand.

2. **Comprehensive Planning -** We provide:
   - **a.** Integrated plans with solutions that will enable clients to attain each of their stated goals
   - **b.** Plans that seek to minimize or eliminate estate tax
   - **c.** Plans that seek to reduce income tax
   - **d.** Plans that provide details of each strategy, year by year cash flows, income tax and estate tax analysis

   Important to you: You have peace of mind knowing that we will look at all of the options and provide you with the ability to produce a comprehensive and thorough plan that meets your client's goals.

   Important to your client: Your client receives the benefit of our combined experience.

3. The Family Wealth Goal Achiever Process™ - This process takes your client from discovery through plan implementation. The Family Wealth Diagnostic process includes:

- **a.** The Family Wealth Diagnostic™
- **b.** The Family Wealth Goal Clarifier™
- **c.** The Family Wealth Goal Achiever™
- **d.** The Family Wealth Goal Implementation Calendar™
- **e.** The Family Wealth Goal Maintainer™

Important to you: This systematic approach to planning provides you with a proven process for securing and completing high net worth client engagements.

Important to your client: The existence of the process allows your client to clearly see and understand the whole process from beginning to end.

4. Insurance Underwriting - We provide life insurance underwriting and expertise. Because of our long-standing relationships and large volume we are able to secure very good payouts and premiere service from the nation's top life insurance providers.

Important to you: You can earn more. Our advisors have learned that we enhance the insurance opportunities.

Important to your client: Your client will know that they have a process working for them designed to keep the insurance bidding process competitive.

5. Monthly case study webinar program - We hold monthly live case study web conferences or have presentations by recognized experts. This allows you to market in your community, build relationships and demonstrate capabilities.

Important to you: By leasing creditability, you bring depth to your relationships.

Important to your client: Your client will know that you have a team of bright open minded professionals working with them.

6. Drip e-mail program - We send out weekly email newsletters to you, your key referral sources, and your referral prospects with a topic of interest in the high net worth arena. This allows you to maintain top of mind awareness as a high net worth solutions provider.

Important to you: You create top of mind awareness.

Important to your client: Their advising team is exposed to practical applications.

7. **The Family Wealth Goal Achiever Process Guide Kit -** This kit allows you to generate Diagnostic reports in your office, taking control of a part of the process and saving fees and costs. The kit also comes with a marketing seminar and tools to market the kit to referral sources and clients.

   Important to you: You have a process for working with high net worth clients

   Important to your client: They have a world class deliverable.

8. **The Periodic Table of Estate Planning Elements -** This table helps clients understand that there are many different techniques, tools and strategies that could be used to help them accomplish their goals.

   Important to you: By leveraging state of the art resources designed specifically for your marketplace, you save time and money.

   Important to your client: They get valuable tools from you.

9. **Document Review and Summary -** We review existing client documents and provide a summary of the critical points.

   Important to you: Save time that would be needed to do the review yourself. Have the benefit of our experience.

   Important to your client: We often find mistakes in documents and structures and we then work with you to help them get corrected.

10. **Document Drafting -** We draft case specific documents for attorneys.

    Important to you: You are better of in front of clients and referral sources. Not in front of the computer or the case law. We free you to do the activities that generate the highest return on investment.

    Important to your client: They will benefit from the extra time you can spend with them.

11. **Document Review for newly drafted documents -** We provide a "second set of eyes" for attorneys who would like us to review planning that they are in the process of developing.

Important to you: For solos and small firm lawyers without experienced partners or officemates, you need someone who can review your work to double check that the documents are clean and effective. This helps reduce liability.

Important to your client: Your client will have the benefit of at least two sets of eyes looking over their documents.

12. **Plan Implementation - Project Management -** We provide complete plan implementation support and management. This includes:
    a. Developing a comprehensive checklist of all items that need to be completed as part of the plan implementation
    b. Assigning responsibilities
    c. Weekly monitoring of the process
    d. Automatic weekly reporting and updating to team members
    e. Bi-weekly status calls to ensure that the process is moving forward

    Important to you: We bring our experience to the table. We take much of the frustration and delay out of implementation. You get paid sooner.

    Important to your client: Plans will be implemented in a more timely and efficient manner.

13. **Plan Updates -** We update the comprehensive plans that we prepare each year.

    Important to you: Have the comfort of seeing that the plan you recommended is working or the chance to make timely adjustments in those areas that need amending or improving. Earn annual update revenue.

    Important to your client: They have the comfort of knowing that you are on top of their situation.

14. **Life Long Learning -** We provide education and training through the InKnowVision Institute's unique programs which allow attendees to gain knowledge and confidence in dealing in the high net worth client marketplace.

    Important to you: Stay abreast with subjects that really matter to your referral sources and your high net worth clients and prospects.

    Important to your client: They have the comfort of knowing that you are staying current on subjects that are important to them.