

# Value Proposition Letters



# Summarize the Value Proposition

*sample diagram*

<b>Example:</b>	<b>Current</b>	<b>Proposed</b>
<b>Estate Taxes</b>	\$14,300,000	\$100,000
<b>Benefit to Heirs</b>	\$15,200,000	\$18,900,000
<b>Income Tax Savings</b>	\$0	\$200,000
<b>Benefit to Charity</b>	\$0	\$21,300,000

# Access Seven Levels of Service

## The Seven Levels of Service Provided By A Capable Planning Team

<b>C</b>	COUNSELOR	FAMILY WEALTH STATEMENT
<b>A</b>	ANALYST	FINANCIAL CHECK-UP
<b>P</b>	PLANNERS	VALUE PROPOSITION LETTER
<b>A</b>	ADVISOR COORDINATOR	TACTICAL PLAN
<b>B</b>	BINDER / PUBLISHER	COMPREHENSIVE PLAN
<b>L</b>	LICENSED IMPLEMENTERS	IMPLEMENTATION DOCUMENTS
<b>E</b>	EVALUATOR / EDUCATOR	ANNUAL UPDATES

# Begin with the Free Discovery Session

Provide  
Clear  
Value  
Before  
Upgrading  
the Level  
of Service

