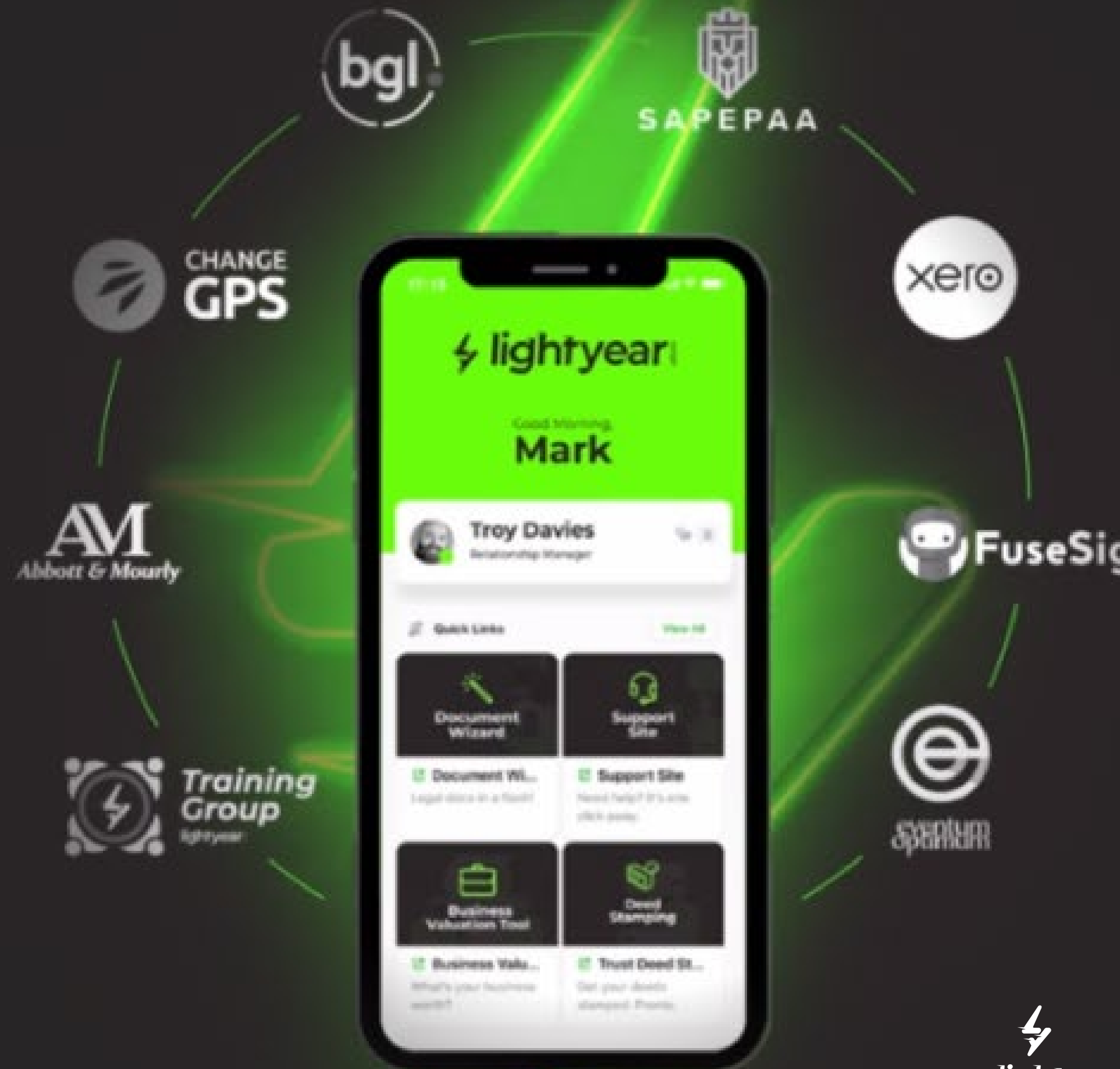


# LYD ONBOARDING SESSION

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Member Support Manager  
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1300 168 380



# We're passionate about bettering businesses.

## Today's Agenda

1. Confirm your LYD product level
2. LY Surge - demonstration
3. Document Wizard – demonstration
4. LY Legal/LBO orientation
5. Question time and additional training preferences.



# 1. Let's check your product

#### STARTER

## Lite \$PAYG

Pay Per Doc  
1 User

FREE ACCOUNT

For sole-traders or small firms that require the occasional doc.

#### Plan Includes:

Pay as You Go Documents  
Documents from \$129  
Public Webinar Access Only  
Hard Copy Ordering\*

Sign up Now

#### MOST POPULAR

## Best Practice \$330/month

200 Docs/year  
Up to 5 Users

Subscribe

For mid-tier firms that regularly create document for clients.

#### Plan Includes:

Public Access Support Site  
Basic Document Support  
Basic Technical Support  
Webinar Access Only  
Public Webinar Access  
Surge App Access  
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Subscribe

#### BEST VALUE

## Strategist \$795/month

Unlimited Docs  
Up to 10 Users

Subscribe

For larger firms requiring the full suite of unlimited documents. Includes estate planning and strategy automations.

#### Plan Includes:

Estate Planning Access  
Strategy Automations Access  
Full Access Support Site  
Priority Document Support  
Priority Technical Support  
Priority Legal Support\*  
Full Webinar Access  
Surge App Access  
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Subscribe

## 2. LY Surge App

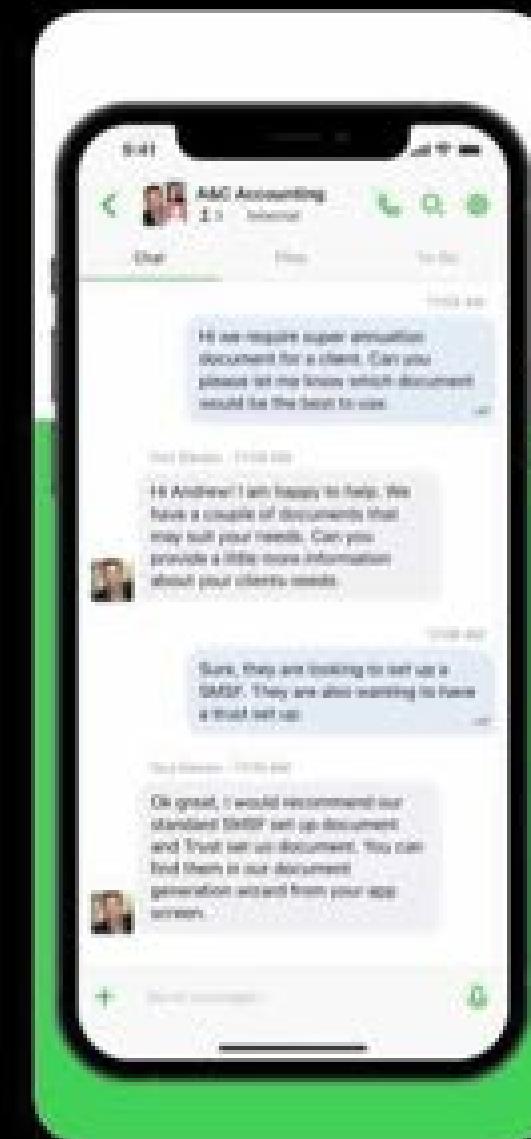


**LY Surge**  
Business

 **LightYear Docs Pty Ltd**  **Business**

GET IT ON  
 **Google Play**

 **Download on the  
App Store**



LY Surge

# We're ready when you are.

## Your one stop customer support hub

1. Direct conversation with the Member Support team.
2. Submit support requests, queries and platform feedback.
3. Speak to the experts.
4. Never miss an important notification from the LYD team.
5. Collaborate with your team.
6. Meet our partners.



# 3. Platform Demonstration

# 4. LBO/LY Legal Demonstration



# The LightYear Group (LYG) Four Strategic Divisions



## LY Docs

A dynamic platform offering advanced legal, estate, and business documents with legal signoff and strategy built-in.



## LY Legal

One of Australia's leading legal drafting and strategic law firm for SMSFs, estate planning, and asset protection.



## LY Legal Back Office

A Joint Venture initiative between LY Legal Back Office (LBO) and advisors for hightouch business optimisation and strategic support for clients through dedicated LBO managers.



## LY Training Group

The education and training arm delivering strategic webinars, and in-depth adviser accreditation programmes.



- Customisation beyond DIY
- Bespoke Deeds like Rectification, Ratification and Confirmation
- Will and EPOA Sign Off and Witnessing
- Legal Support





### Offer Comprehensive Solutions to Clients

Go beyond a simple deed upgrade by delivering an integrated blend of legal and strategic offerings - expanding the scope, the brochure of services and the value of your current business.

### Earn Commissions on Bringing Clients

Bring in reliable clients and earn fixed commission on every successful LBO project while letting LBO do the heavy lifting.

### Dedicated LBO Manager

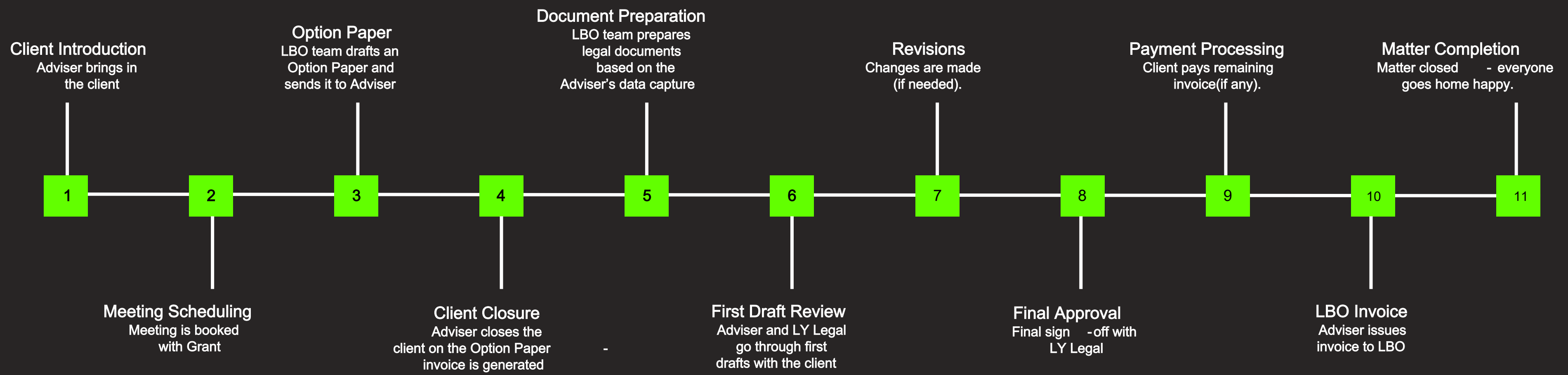
Get access to a single point of contact for all LYD needs. Eliminate confusion from dealing with multiple support contacts.

### Access to Exclusive Strategies

Capitalise on your offerings with exclusive LBO -driven strategies for your client's estate planning and asset protection needs.

# LBO Process - From Client Onboarding to Document Creation

Our comprehensive eleven-step process ensures seamless client management and document delivery.





## Success Story - LY LBO

Paul, an accountant with a strong SMSF client base, was advising the Roberts family and marriage for both spouses, adult children on either side, and a valuable SMSF and family trust structure. With the family home held in a discretionary trust, and a significant super balance sitting in SMSF, Paul was increasingly concerned about the risk of assets passing outside the bloodline. He knew they needed a strategy that locked in control and succession and found himself constantly bogged down managing legal documents, trust updates, and SMSF compliance issues.

Through LBO, Paul referred the Roberts family. We, as the LBO team, reviewed the structure, replaced the old BDBN with the SMSF Will, implemented a Family Protection Non-Foreign Persons Trust to quarantine the home, and ensured control would pass via successor roles and default legal provisions. Importantly, Paul didn't have to manage any of the legal process. LBO handled it all, while keeping him in the loop. The family gained certainty, the SMSF retained control, and Paul was free to focus on growing his practice, not chasing paperwork. The outcome was simple and strong: assets protected without running the bush. Paul was relieved back to tax planning, investment work, and finance because LBO handled the legal workload from start to finish.

# Testimonials

Shannon Smit  
SMART Business Solutions

*"Signing up to LightYear Docs is a no brainer. You have access to your basic everyday documents but also a variety of non-conventional and technical documents with legal sign off plus the fortnightly education to upskill yourself and staff. Accessing all this under one platform eliminates the separate costs associated for CPD hours and legal sign off or research."*

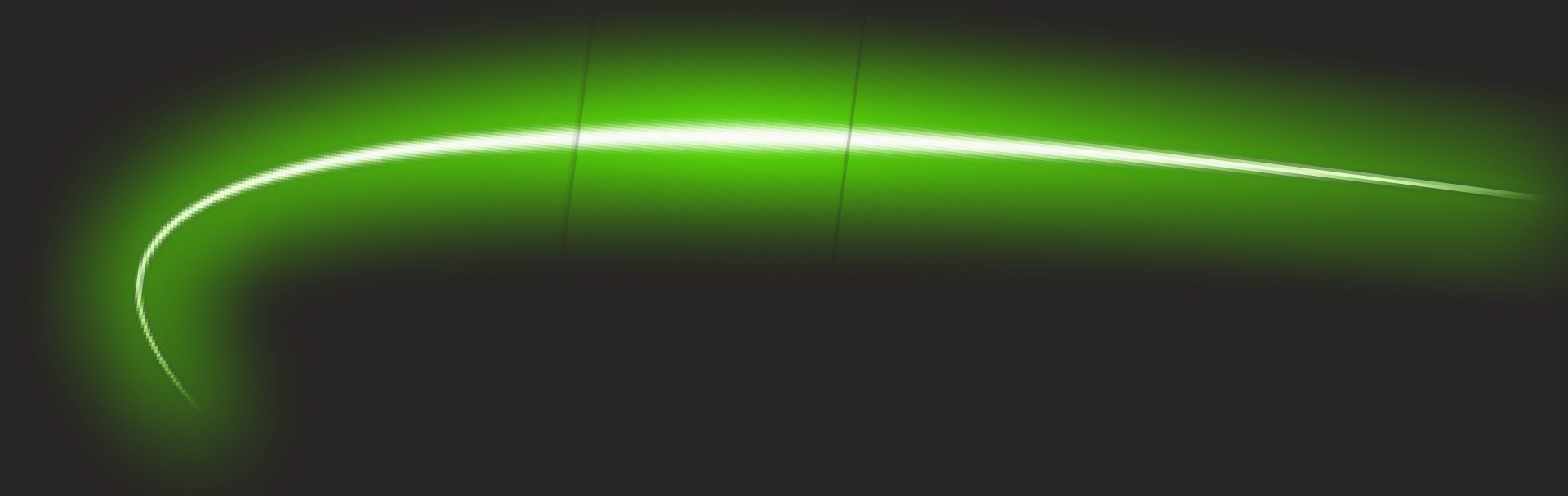
Peter Marmara -  
Stewart  
PCR Accounting & Advisory

*"LightYear Docs is pretty simple and easy to use. We have improved by what we can offer our clients in terms of asset protection and estate planning and have seen a 10% increase at least to our revenue. It's so useful to have a range of partners to use. We continue to learn and grow to provide solutions to our clients."*

JohnGowing  
GowingAdvisory

*"All the documents we facilitate and our clients history are retained within the LightYear Docs platform, we have never lost anything. The System is fast, ~~never~~ and I have gained valuable user experience."*

# 5. Questions & Additional Training





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