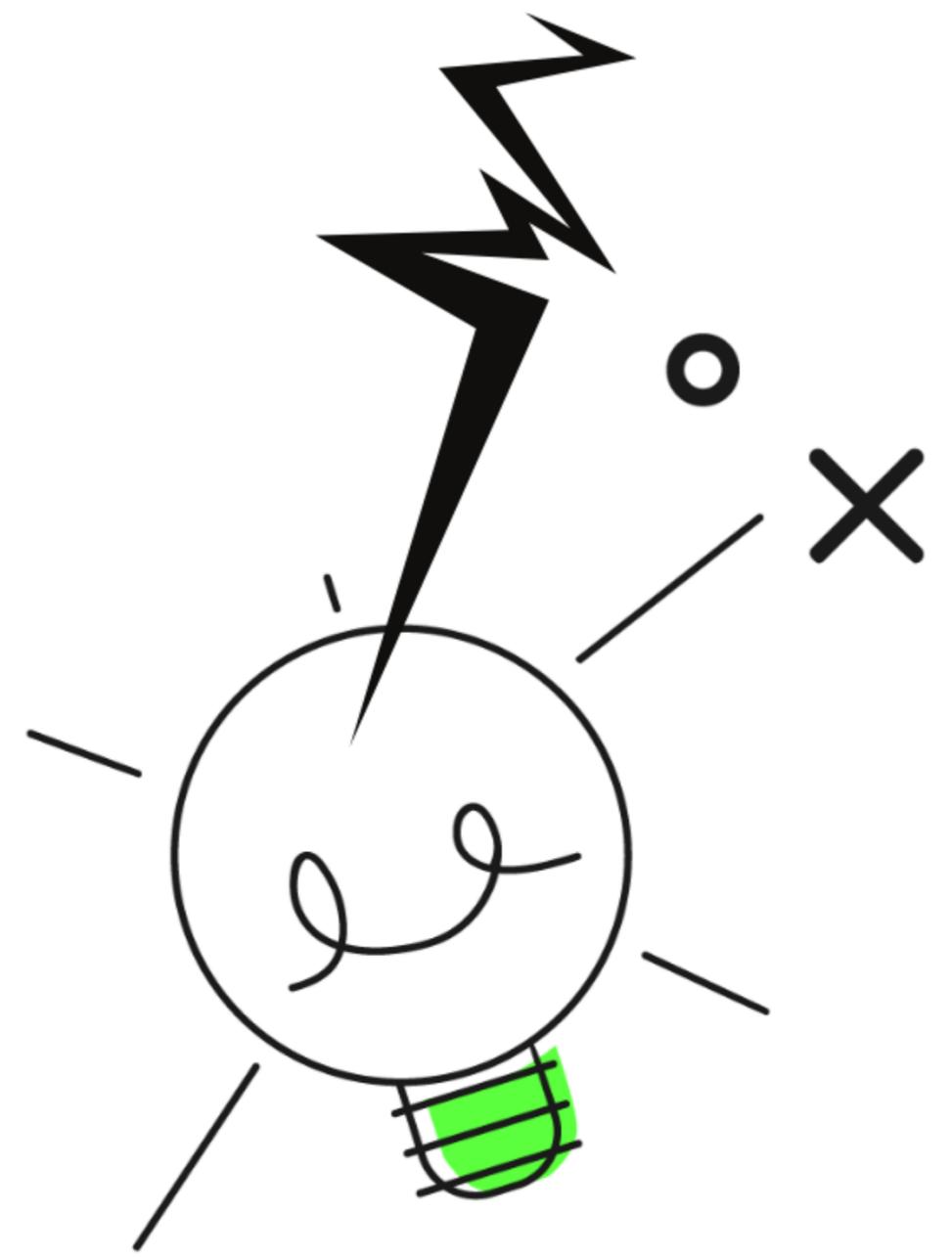


**WEBINAR**

**2023 WITH LYD  
- SHOOT THE  
LIGHTS OUT**



**12** **JAN 2023**  
**12:30PM**

# Start your Engines

with Grant Abbott,  
Ben Gill and Michael  
Jeffriess



light  
year docs

2023  
START

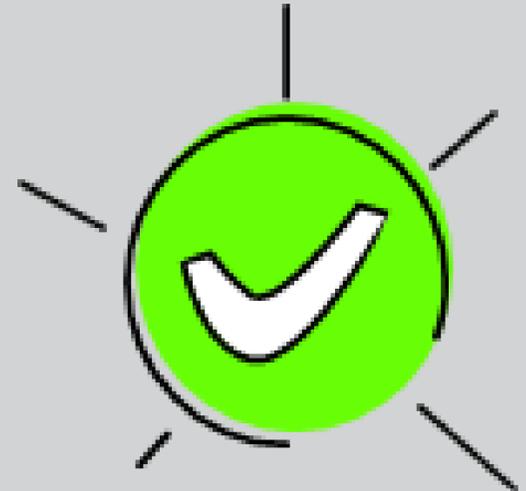
There is no sugar coating 2023. Businesses are going broke, a global recession is coming at us full steam, interest rate rises are smashing homeowners, AIR BnB has downsized the rental market, asset deflation is going to hit superannuation, death rates are increasing while birth rates are decreasing, household savings and the Regulators are getting nasty. Then there is AI which is a real game changer.

Change is coming and if you don't ride it, then you are going to be washed around in its surf. We are here to not only help you see the year ahead but also to make the most of the opportunities. Game on!



°  
x

# Group CEO Update



# LightYear Docs gives you more than any other provider



light  
year docs

- **More Documents:** over 230 documents all signed off by lawyers
- **More CPD:** over 32 hours of high quality CPD for our Strategist Members and 12 for all users.
- **More real legal support:** Strategists have access to Abbott & Mourly for live client queries.
- **More value-added partnerships:** – AM Lawyers Legal Back Office, We Love Group for outsourced bookkeeping, accounting, SMSF and coaching, Eventum Optimums stamps and registration offering.
- **More development:** Extending the platform with integrations and robots
- **More high earning documents:** over 12 strategic documents that will generate \$5,000 or more.
- **Plus, so much more to come!**

# Let's get Excited

## Development, Product + Partner Solutions

### Development

- New Company process - this is going to be BIG
- App partner Integrations
- Data Hub
- New multi document process
- And a lot more to come....

### Product

- Even more documents to be rolled out

### Partner Solutions

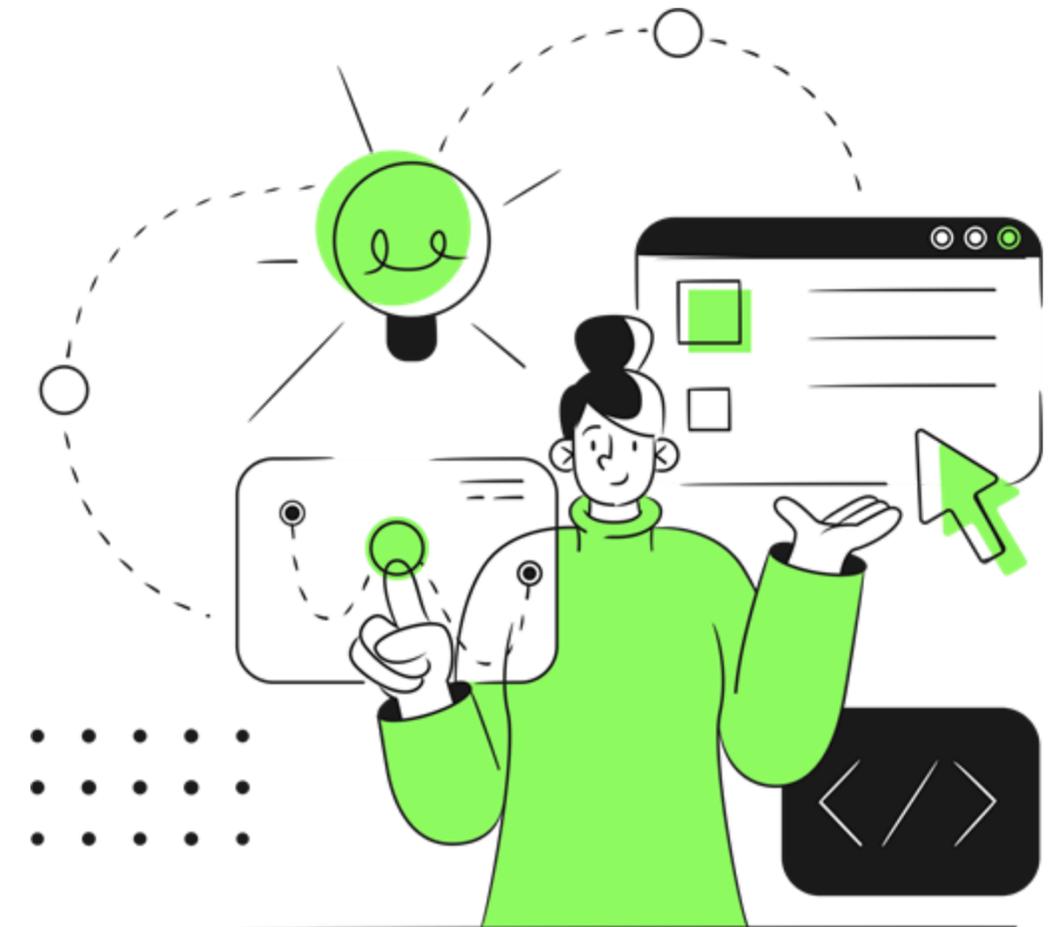
- Full Trust Solutions Service
- Improved processes and delivery

### Team and Business Updates

- Client Support to Member Support Team
- Member Success Officer
- LYG Capital Raise

### LightYear Training Group

- Grant has been appointed as LYTG CEO to build out this game changer.
- Best of breed > trainers, content, materials, learning delivery, and much more



# Plus LightYear Training Group for all your accreditation offerings



[HOME](#) [OUR TRAINERS](#) [BLACK DOG INSTITUTE](#) [FAQ](#) [CONTACT US](#)

[UPCOMING EVENTS](#)

## Professional development and training reimagined.

Ditch the boring webinars; we provide dynamic sessions that will cover every area required for CPD/TPB. We've handpicked a panel of world-class, accredited trainers who specialise in various fields with extensive experience to accelerate you to your best.

[BROWSE EVENTS](#)

[MEET OUR TRAINERS](#)

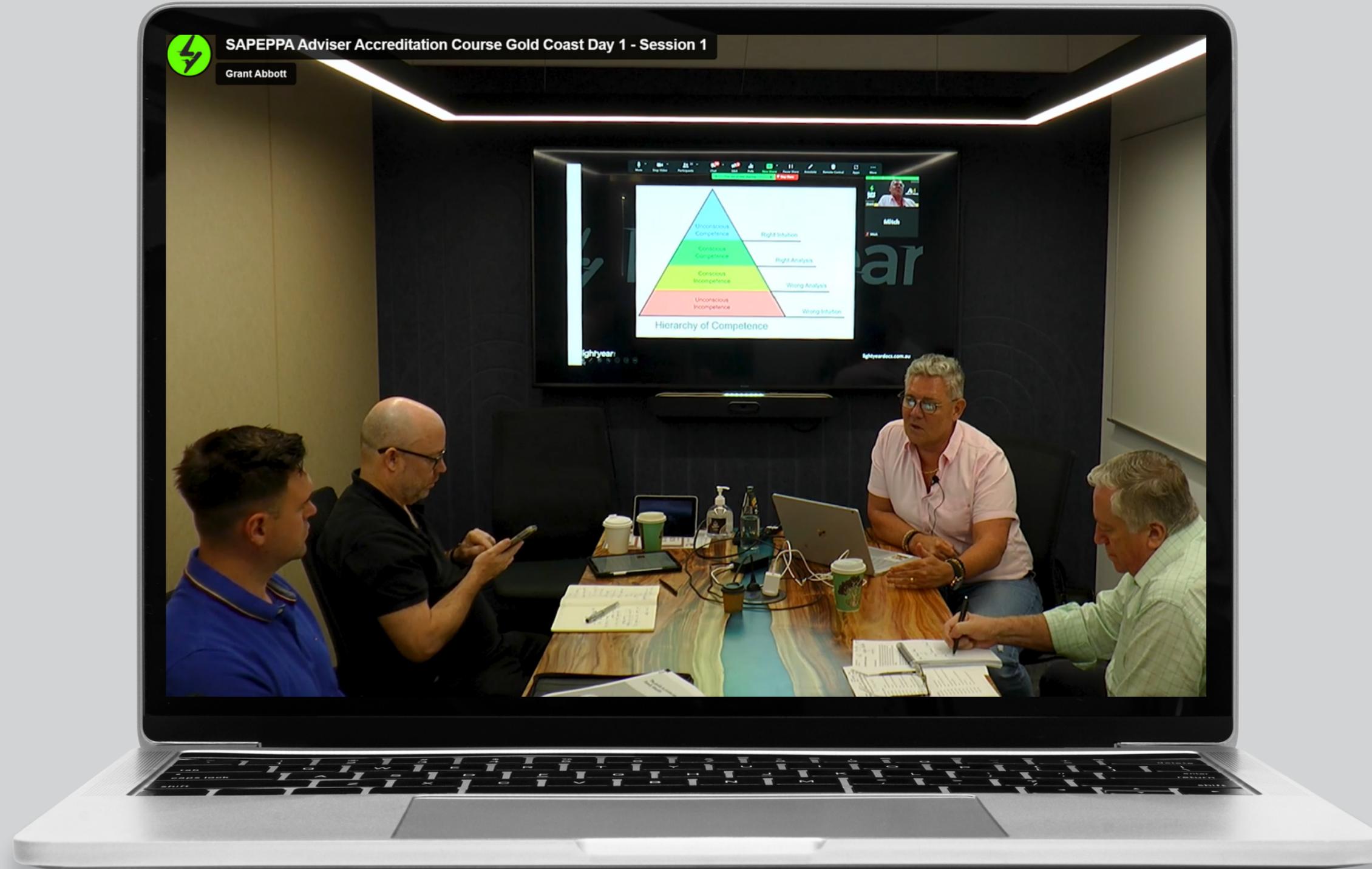


# Learning from the Experts

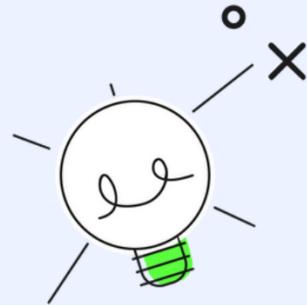


light  
year docs

Training  
Group  
lightyear



# Accredited Courses



## 2-3 Day Courses

**SAPEPAA ACCREDITATION COURSE**  
13 Mar 2023 - 3 days  
Zoom Webinar

### SAPEPAA Accreditation Course

Mon, 13 Mar | Zoom Webinar

Tickets

**ADVANCED ESTATE PLANNING COURSE WITH CERTIFICATE**  
17 Apr 2023 - 2 days  
In person/Zoom

### Advanced Estate Planning Course...

Mon, 17 Apr | Zoom Webinar

Tickets

**FAMILY ADVISORY BOARD ACCREDITATION**  
15 May 2023 - 2 days  
Zoom Webinar

### Family Advisory Board Accreditation

Mon, 15 May | Zoom Webinar

Tickets

**SMSF SPECIALIST ACCREDITATION COURSE**  
12 June 2023 - 3 days  
Zoom Webinar

### SMSF Specialist Accreditation Course

Mon, 14 Aug | Zoom Webinar

Tickets

**SUCCESSION, ASSET PROTECTION AND ESTATE PLANNING ADVISER ACCREDITED COURSE**  
PROVIDED BY Training Group | COURSE ACCREDITED BY SAPEPAA

### SAPEPA Accreditation Cour...

Self-paced | Rise

Tickets

**TRUSTS AND COMPANIES INTENSIVE**  
Dates TBA  
Zoom Webinar

### Trusts and Companies Intensive

Time is TBD | Zoom Webinar

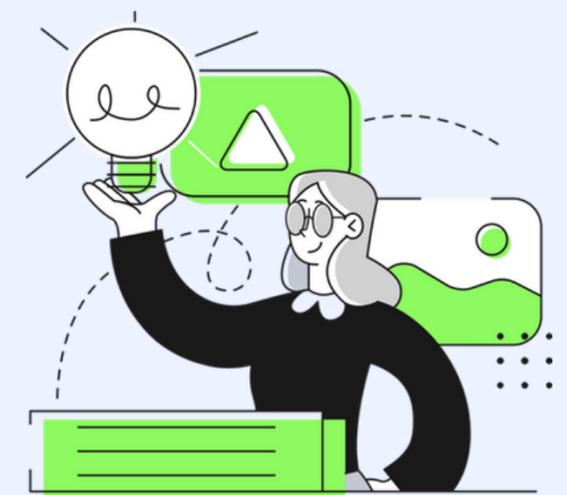
Tickets

# Half Day Training with Experts



## Half-Day Seminars

 <p><b>SMSF 101</b> 9.00am AEST 23 Jan 2023 9.00am - 10.30am AEST</p>	 <p><b>ESTATE PLANNING FOR ACCOUNTANTS</b> 9.00am AEST 30 Jan 2023 Live and streamed</p>	 <p><b>ASSET PROTECTION INTENSIVE WITH CASE STUDIES</b> 9.00am AEST 20 Feb 2023 Zoom Webinar</p>
<p><b>SMSF 101</b> Mon, 23 Jan   Zoom Webinar</p> <p><a href="#">LEARN MORE</a></p>	<p><b>Estate Planning for Accountants</b> Mon, 30 Jan   Zoom Webinar</p> <p><a href="#">LEARN MORE</a></p>	<p><b>Asset Protection Intensive with Case..</b> Mon, 20 Feb   Zoom Webinar</p> <p><a href="#">LEARN MORE</a></p>
 <p><b>ASSET PROTECTION 101</b> 1.30pm AEST 20 Feb 2022 Zoom Webinar</p>	 <p><b>THE BUSINESS OF ACCOUNTING</b> 9.00am AEST 22 Mar 2023 Live and streamed</p>	 <p><b>LEADERSHIP TRAINING</b> 9.00am AEST 3 May 2023 Zoom Webinar</p>
<p><b>Asset Protection 101</b> Mon, 20 Feb   Zoom Webinar</p> <p><a href="#">LEARN MORE</a></p>	<p>Membership Offer</p> <p><b>The Business of Accounting</b> Wed, 22 Mar   Zoom Webinar</p> <p><a href="#">LEARN MORE</a></p>	<p><b>Leadership Training</b> Wed, 03 May   Zoom Webinar</p> <p><a href="#">LEARN MORE</a></p>
 <p><b>ADVANCED PROPERTY AND PROPERTY DEVELOPMENT STRATEGIES</b> 9.00am AEST Date TBA Zoom Webinar</p>	 <p><b>CLIENT MEETINGS FOR FUN AND PROFIT</b> 9.00am AEST Date TBA Zoom Webinar</p>	
<p><b>Advanced Property and Property...</b> Time is TBD   Zoom Webinar</p> <p><a href="#">LEARN MORE</a></p>	<p><b>Client Meetings for Fun and Profit</b> Time is TBD   Zoom Webinar</p> <p><a href="#">LEARN MORE</a></p>	

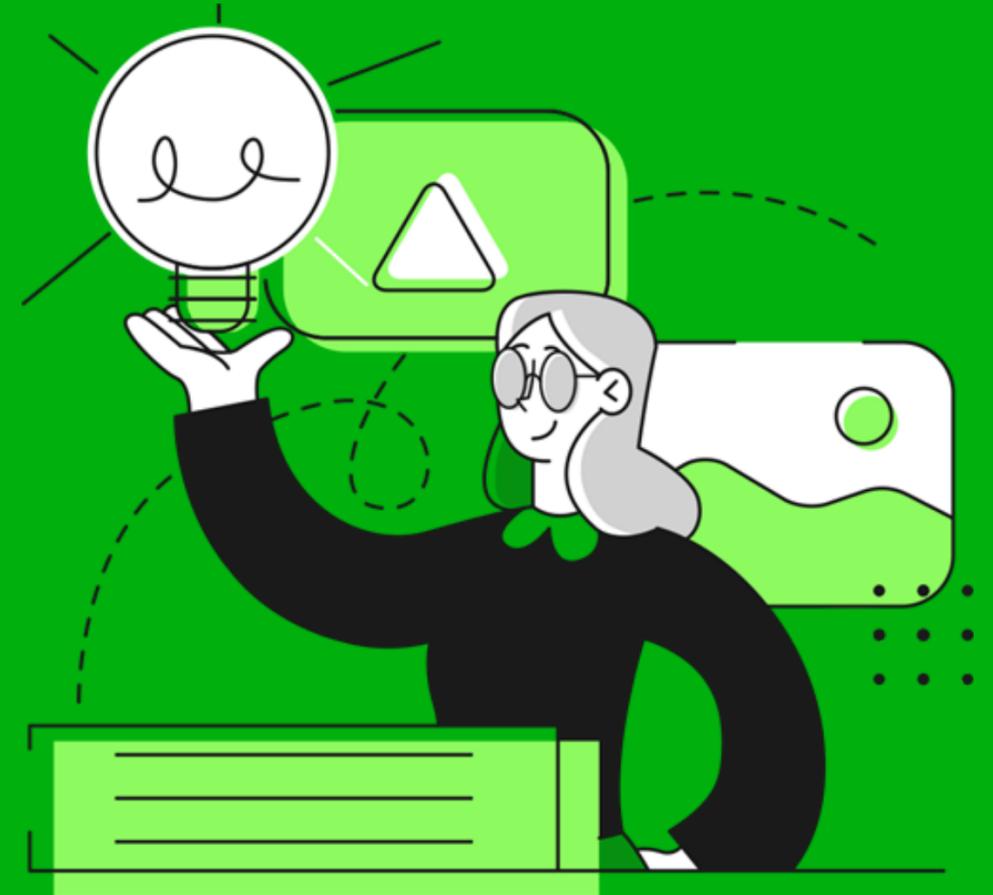


"It is very lucky for anyone to get in on the ground floor of anything, even once. It happened to me with SMSFs in 1994 and my career hit a jackpot. Now SAPEPAA is so much bigger and worldwide, every day I get up at the end of a rainbow, feel the passion and protect families."



°  
x

# Grant's Top Seven 2023 Strategies



# The \$1M Question

How important is it for you to protect your family's wealth for your bloodline for generations to come?



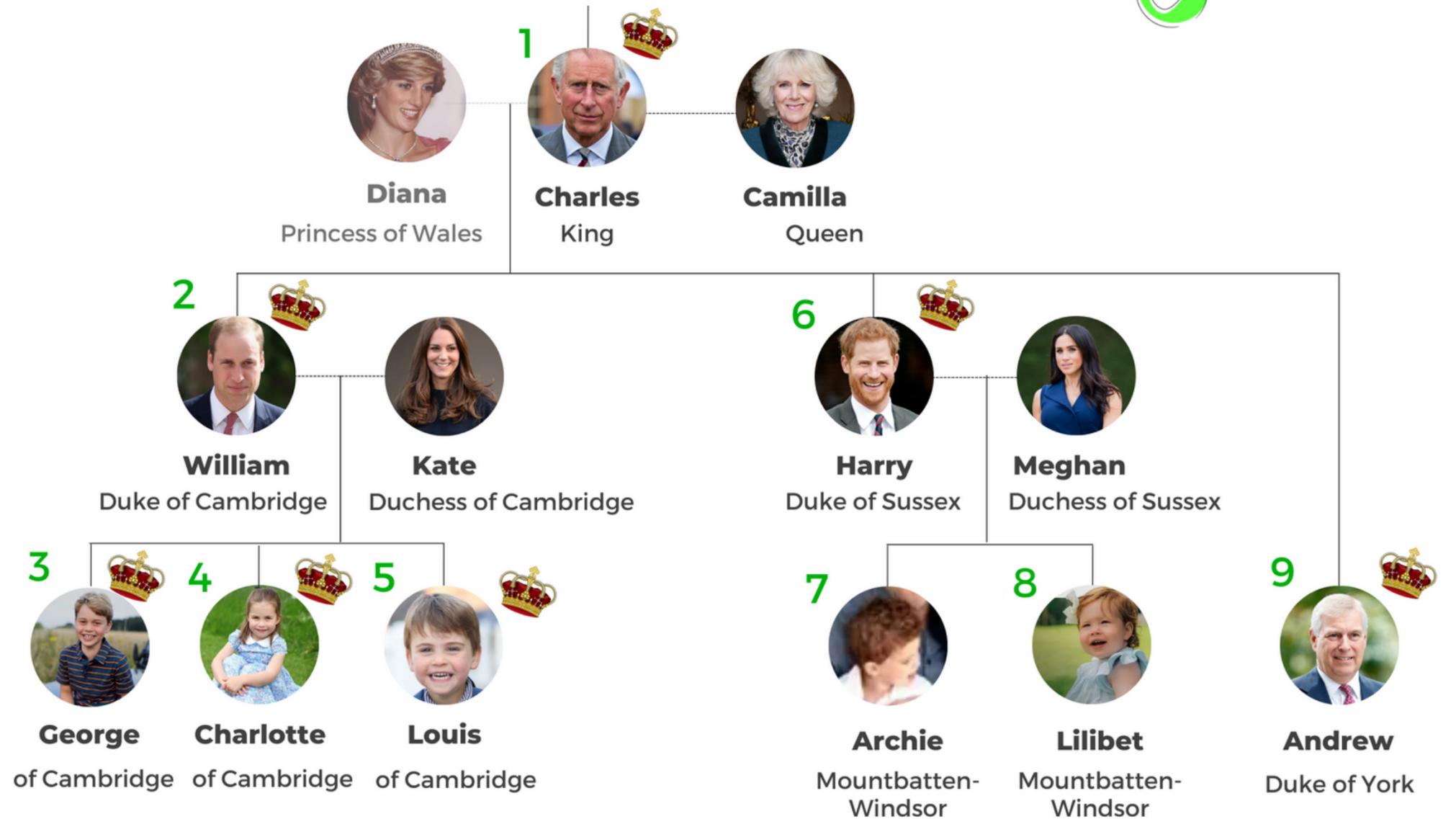
# Strategy One

## Line of Succession



# Line of Succession is all important

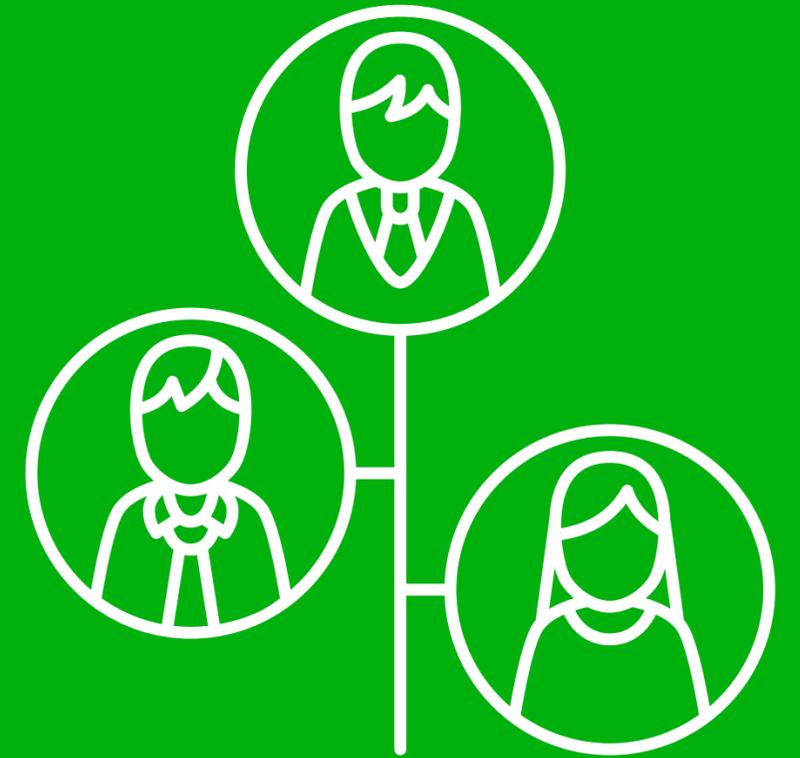
## British Monarchy Line of Succession





# Strategy Two

## Successor Directors



# Strategy Three

## Family Protection Trust



### Elizabeth Hurley's son cut from father's family trust

Bang Showbiz · 14 hrs ago



Like | Comments | 22

Elizabeth Hurley's son has been cut from his father's family trust.



© Bang Showbiz Elizabeth and Damian Hurley

Before Stephen Bing took his own life last year, he won a court battle overturning his father's attempt to exclude his children, Damian Hurley, 19, and Kira Bonder, 23, from a family trust but that decision has now been overturned on appeal.



# Strategy Four

Multi-Generational  
Trust Splitting



°  
x

# Strategy Five

## Gift and Loan Back - The Protector





# Strategy Six

## Testamentary Trusts



# Strategy Seven

Protecting Founder  
Monies - The Enforcer



# MJ's tips on what you should be doing now in your firm for success in 2023

- **Implement all the strategies you have just heard from Grant and Ben - crazy if you don't.**
- You need to plan for all through and allocate resources to it.
- **Focus on your value add and outsource the rest**
- LYD has a number of member firms doing this. Happy to discuss further.
- **Consider your environment - very important given a changing economic front.**
- We kicked off planning for this on 28th December 2022
- A focus on coaching, cashflow systems and ramping up client value add
- EO checklists are a must!



# MJ's tips on what you should be doing now in your firm for success in 2023

- Client retention strategies are a must. The economy may likely put pressure on business OPEX. This will see businesses looking at reducing \$\$\$ Marketing and people are usually first but there could be a knock to accounting fees. We are doing this at LightYear with new role rollout. But within your firm concentrate on your clients and what you can do to help them.



- **Goal workshops with your team**
- Workbooks and process for setting goals, changing habits.
- Focus on helping your teamwork towards goals - work, career, wellbeing, etc.
- This has significant value for your team members who want to be involved which in turn helps with retention.



# The Science of Habit

What does it take to stick with something long term? You just have to rewire your brain.



# The Science of Habit

What does it take to stick with something long term? You just have to rewire your brain.

4. Reward  
Pleasurable distraction, relief from boredom/work (reinforces desired habit)



3. Response  
Close your eyes and put on a podcast or audiobook for 15 minutes



2. Craving  
A break from the boredom and mental work



1. Cue  
Bored, doing work or studying



**THE  
HABIT  
LOOP**  
(Desired habit)



Do you believe you could add more services using LightYear Docs Tools

Yes!

How many business clients do you have?

100

The Strategic Foundation	Average Price	Conversion Rate	Number of Clients	Total
Discretionary Trust Deed Upgrades	\$ 400.00	50%	50	\$ 20,000.00
Trustee Distribution Resolution (annual)	\$ 250.00	100%	100	\$ 25,000.00
SMSF Trust Deed Upgrades	\$ 400.00	30%	30	\$ 12,000.00
Company Set ups	\$ 1,000.00	50%	15	\$ 15,000.00
Company set ups with Successor Director	\$ 1,100.00	50%	50	\$ 55,000.00
<b>Total Value of Strategies</b>				<b>\$ 127,000.00</b>

Leading Member - Asset Protection - best as a certified	Average Price	Conversion Rate	Number of Clients	Total
Leading Member discretionary trust	\$ 2,200.00	20%	20	\$ 44,000.00
Leading Member discretionary trust upgrade	\$ 2,200.00	50%	50	\$ 110,000.00
Successor Director Solution with Indemnity	\$ 450.00	100%	100	\$ 45,000.00
The Protector	\$ 5,500.00	50%	50	\$ 275,000.00
The Business Protector	\$ 7,500.00	50%	50	\$ 375,000.00
Leading Member SMSF	\$ 2,200.00	20%	20	\$ 44,000.00
Leading Member SMSF deed upgrade	\$ 1,100.00	20%	20	\$ 22,000.00
<b>Total Potential Value of Accounting Strategies</b>				<b>\$ 915,000.00</b>

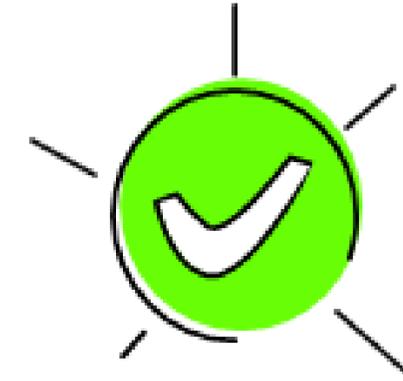
Estate Planning and EPOAs	Average Price	Conversion Rate	Number of Clients	Total
Couples Basic Will with EPOA	\$ 2,200.00	50%	50	\$ 110,000.00
Couples Will with Testamentary Trust and EPOA	\$ 3,700.00	35%	35	\$ 129,500.00
SMSF Will	\$ 750.00	50%	50	\$ 37,500.00
Family Allowance Agreement	\$ 1,750.00	50%	50	\$ 87,500.00
			-	\$ -
<b>Total Potential Value of Wealth Creation Strategies</b>				<b>\$ 364,500.00</b>

Budgetted Revenue

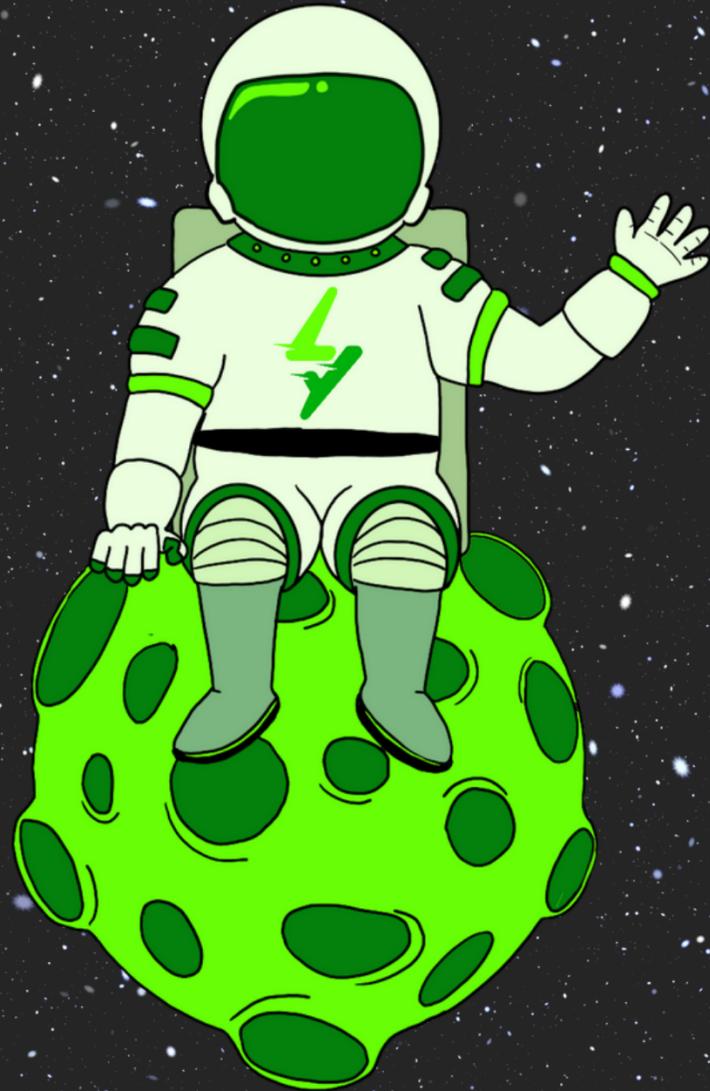
\$

1,406,500.00

# Road to Business & Revenue Success - First Year



Sign up for a **FREE** account



# 2023 Check List for LYD Members

Grow your firm with LYD in 2023

1. Join SMSF 101 course
2. Join Estate Planning 101
3. Visit the Success Hub tools, marketing etc.
4. Upgrade your deeds to LYD
5. Upgrade your constitutions to include successor.
6. Join weekly webinars
7. Join our Vlog (NEW YouTube Channel) & Socials
8. Complete HR document training course
9. Complete road to success tool
10. Offer 1 new strategy a quarter