



**Legacy, Exit & Acquisition Planning Strategies (LEAPS) Sign Up Form**

<b>Name:</b>	
<b>Rep #:</b>	<b>Phone Number:</b>

**Successor Search Resources Level:**

<input type="checkbox"/> <b>Silver Level</b> – postage +\$250 (list of advisors in your area for you to showcase your offering) (samples available)
<input type="checkbox"/> <b>Gold Level</b> – printing/campaign design, postage + \$600 (mailing and succession coaching and lead prequalification's – business valuation* 1/year) <input type="checkbox"/> Continuity Plan – add \$500* <input type="checkbox"/> Succession Plan add \$1500*
<input type="checkbox"/> <b>Platinum Level</b> – \$3,000 (includes Gold, Continuity and Succession Plan*, 3 candidates guaranteed, an additional hour of coaching and double the mailing radius)
<input type="checkbox"/> <b>A La Carte</b> <input type="checkbox"/> Business Valuation \$500* <input type="checkbox"/> Continuity Plan \$500-\$950* <input type="checkbox"/> Succession Plan \$1750*
<input type="checkbox"/> <b>Miscellaneous / Additional Fee</b> <input type="checkbox"/> \$ _____ Reason: _____

**Method of Payment:** \_\_\_\_\_ **Total to be Billed at this time:** \_\_\_\_\_

<input type="checkbox"/> <b>Check</b> – payable to United Planners
<input type="checkbox"/> <b>Debit from Commission Cycle</b> <input type="checkbox"/> 1 cycle <input type="checkbox"/> 2 cycles <input type="checkbox"/> 3 cycles Start date: _____

Signature

Date

\*Provided by SRG (additional costs may apply)

\*\*Prices subject to change – limited time offer

**Complete and return to: Tracy Stout**

[tstout@upfsa.com](mailto:tstout@upfsa.com) or via fax: 480-624-0318