



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

Name:	
Rep #:	Phone Number:

Successor Search Resources Level:

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

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

<input type="checkbox"/> Check – payable to United Planners
<input type="checkbox"/> Debit from Commission Cycle <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: Kris Cunningham

kcunningham@upfsa.com or via fax: 480-624-8169