



Three Simple Steps to Get Started with Legacy Safeguard

Legacy Safeguard can help your clients leave a lasting legacy for those they love — and help you deepen and strengthen your client relationships. Follow the steps below to get started!

REGISTER YOUR AGENT ACCOUNT

Scan the QR code to complete your Agent Registration. Then log in to access helpful training videos, guides and more! Scan to Register



Step 2

Step

1

COMPLETE YOUR LEGACY SAFEGUARD MEMBERSHIP REGISTRATION

Scan the QR code to complete your very own Legacy Safeguard membership registration. This member registration process follows how you can enroll your clients!







OFFER LEGACY SAFEGUARD TO YOUR CLIENTS — AND ASK FOR REFERRALS!

Offer Legacy Safeguard to your clients and help them enroll. Be sure to ask each client about people they know who might also benefit from this service. Let them know to watch for their Welcome Letter and Membership Cards in the mail.