

Medical Providers:
Text to these 3
numbers to participate
during this session with
questions or comments

801-691-3292
801-369-1690
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The Strategy and Solution To...

- Protect Against Lawsuits
- Protect Your Personal Estate
- Increase Your Tax Savings
- Protect Your License

Your Presenter:

Natalyn O. Lewis



Why Do We Choose to Settle?



Time



Cost



Emotional
Strain

What is YOUR Number?

What Was MY Number?



LAWSUIT!

\$25,000 to make it NEVER
happen again!

Who Loses in a Lawsuit?



- Do you lose if you settle?
- Do you lose if you fight?
- When do you lose control?

The **ONLY** way to win is to remain in control by being prepared ahead of time.



Legally Mine: Your Asset Protection Specialist

- Serving Medical Professionals for over 40 years
- 12 year unique, rock solid strategy
- Over 12,000 medical professionals
- **NO** lawsuits continue
- Our mission: PROTECT YOU
- Dramatic **tax savings**
 - W-2/1099 = **\$10-12K/year**
 - Own Practice = **\$15-20k/year**



Are Americans Litigious?

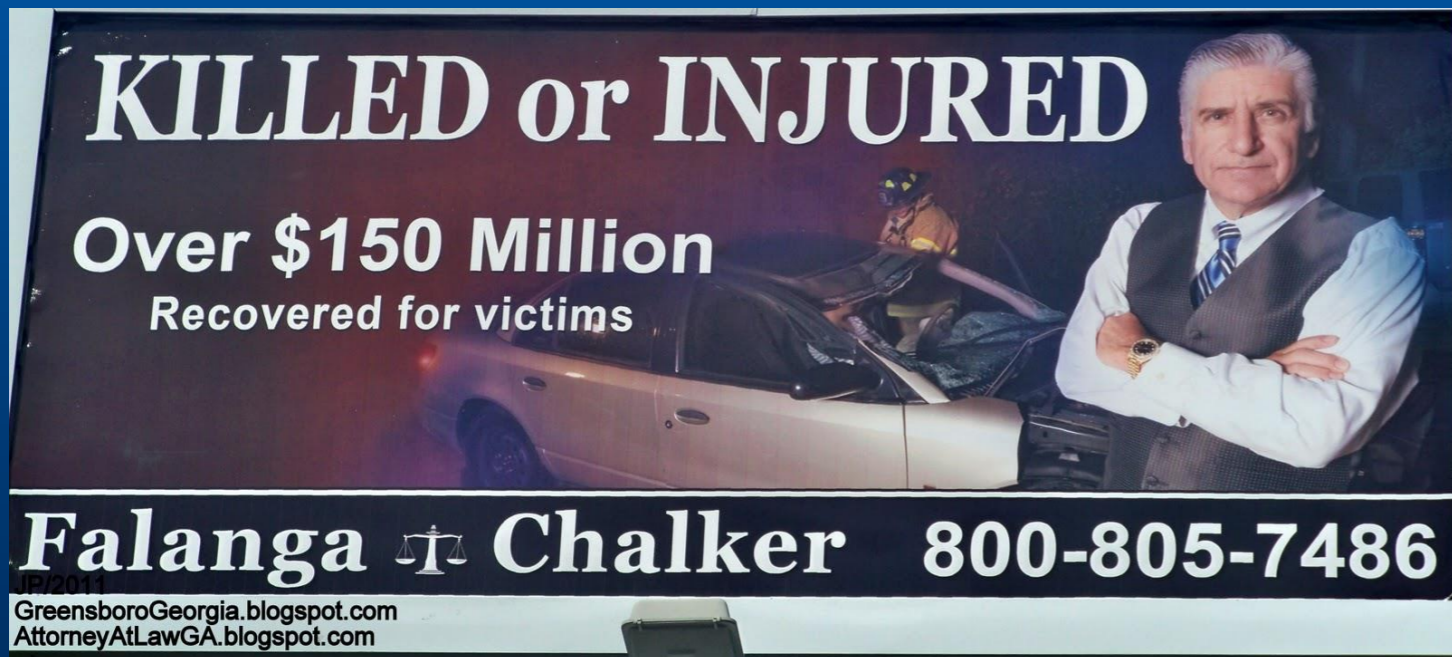


Ever Argued With A Woman?
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WHEN THEIR **TXT**
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Dan Got Us **\$600,000**
DAN NEWLIN & PARTNERS
"407 888 8000" Thanks Dan!!
RESULTS BASED ON THE UNIQUE FACTS OF EACH CASE. OFFICES - ORLANDO
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WHAT'S YOUR CASE WORTH?
FREE CASE REVIEW - 303.333.8000
LEVINE LAW

100 Million Lawsuits Last Year



5% of World's Population
**90% of the World's
Lawsuits**



Why So Many Lawsuits?

- USA Today article
“Best way to get rich...SUE!”
- “Because you have more than I do and I need it more than you do.”



Why is it Getting Worse?

- Nation is run by attorneys
- No ramifications for suing
- More suits every year
- Increased odds of losing
- 7 out of 10 lawsuits award a settlement of \$3,000 - \$75,000
- Medical professionals have 50% chance of being sued



Do YOU Want to Beat the Odds?

4 Key Strategies



- Uniquely structured entities
- Supreme Court backed
- With massive tax advantages (\$10,000+/annually)
- Fully executed (3-4 hours of your time)

How Does It Work?

CAUSE

You **CANNOT** control

MOTIVATION

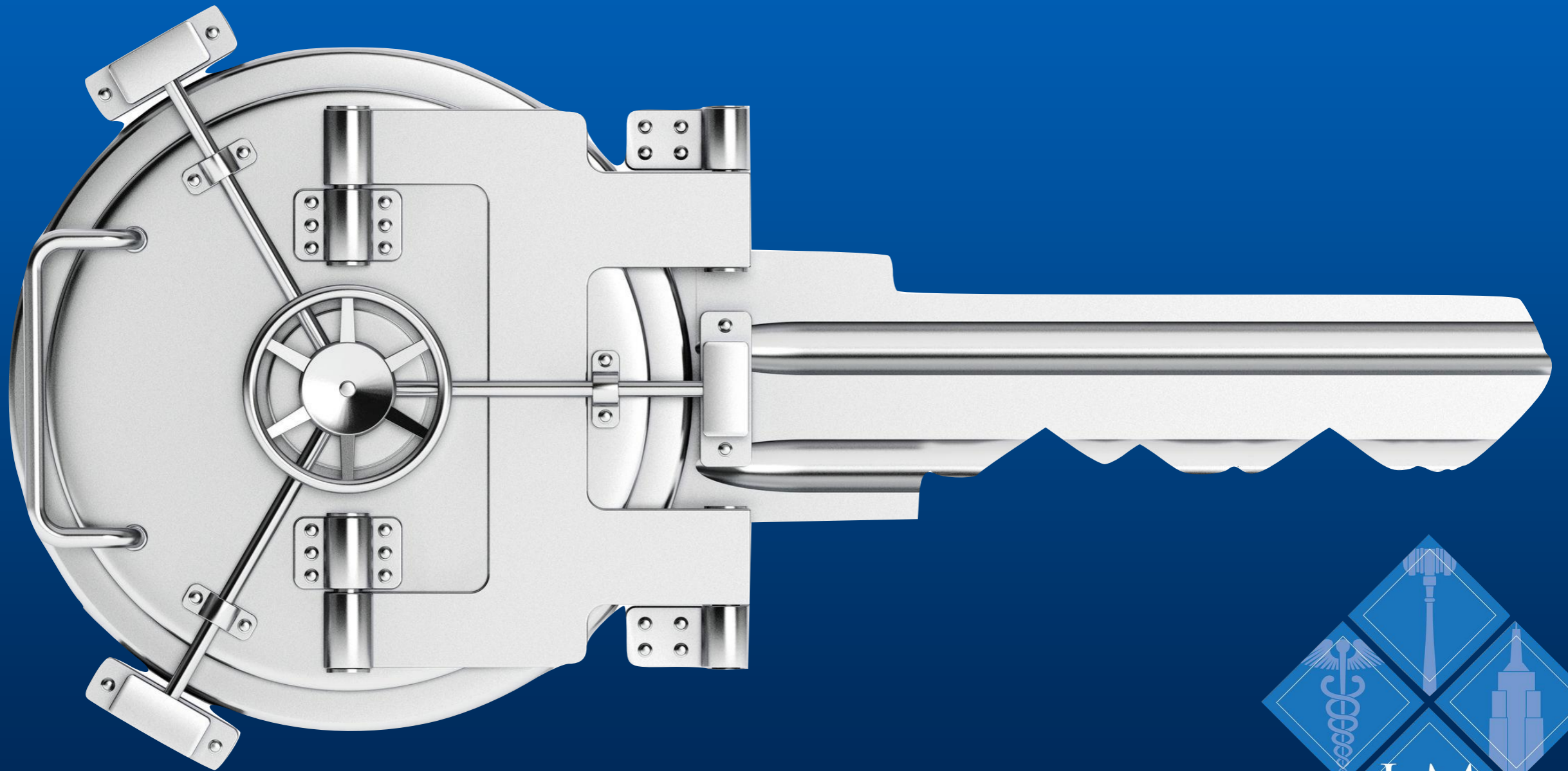
You **MUST** always control

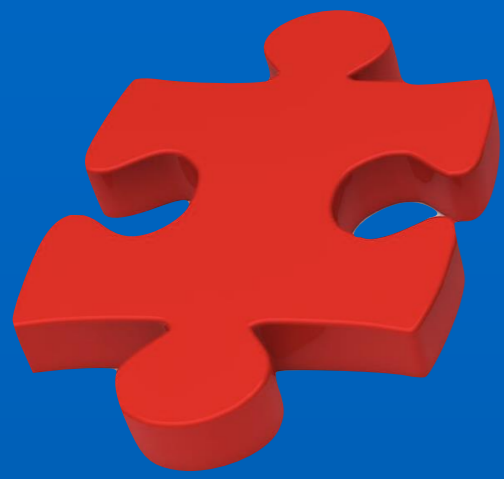


What Motivation Do YOU Have on the Table?

- **Bank Accounts**
- **Investment Accounts
(Stocks/Bonds)**
- **Life Insurance Policies**
- **Retirement Accounts
(some states)**
- **Cryptocurrency**
- **Gold/Silver**
- **Artwork**
- **Jewelry**
- **Cash in a safe**
- **Valuables in your home**
- **Other items...**

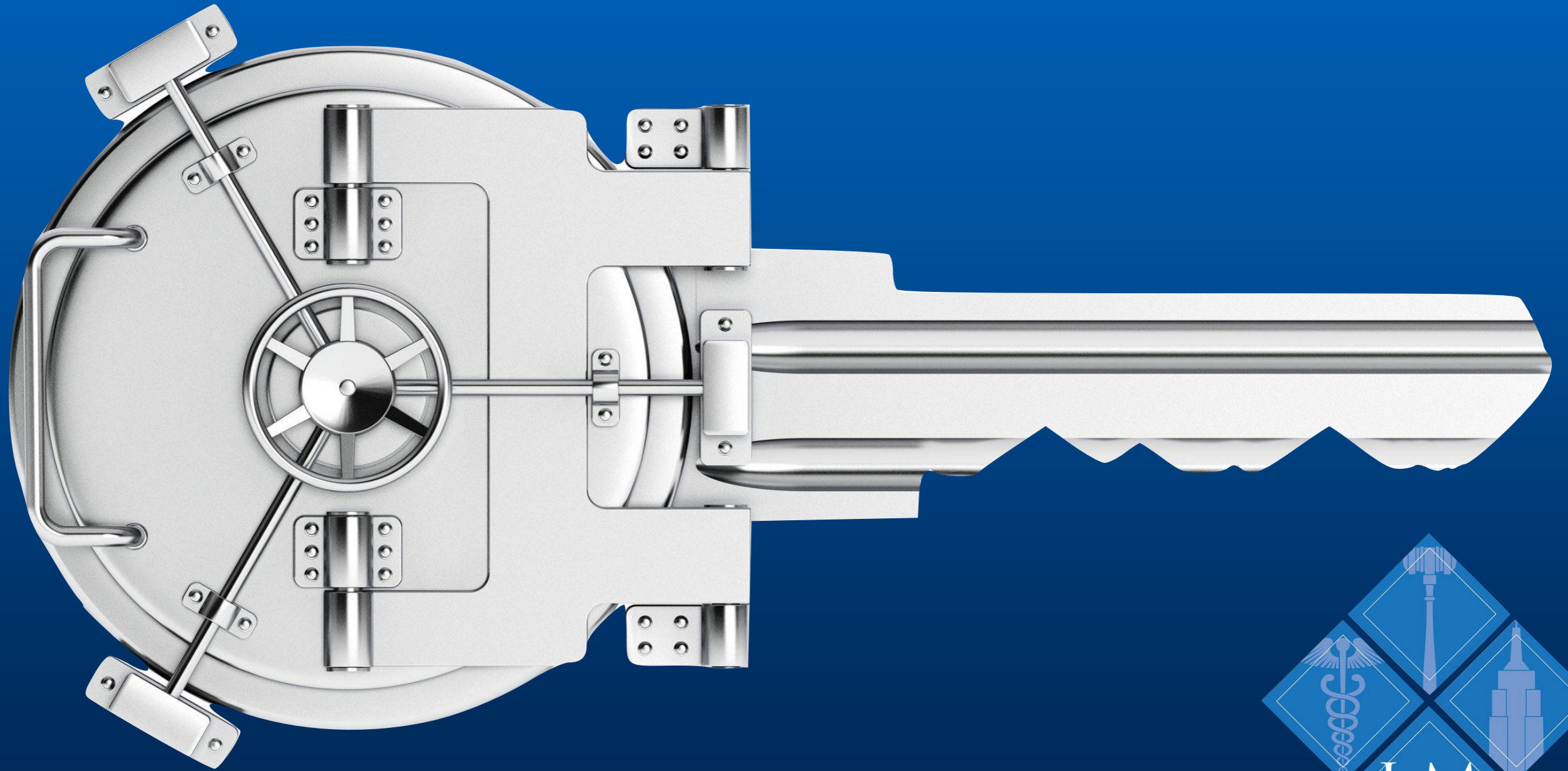
What if you could put 99% of your safe assets in a vault and you were the **ONLY** one who had the key?





STRATEGY #1

Family Limited Partnership (FLP)



Family Limited Partnership



General Partner Owns:

- **100%** Control
- **100%** Liability

1%



Limited Partners owns:

- **NO** Control
- **NO** Liability

99%



“Legally Mine has been extremely professional and thorough in assessing my needs and the needs of my family and business. **My only regret is that I did not use them years ago and if so, I would have been in a much better situation today. My blessing is that I now have them on my side to protect me and my family.** They think of Everything and are fantastic at communicating and making sure you understand the advice they are giving and what they propose to protect you...”

Dr. Makarita



What Other Assets Do YOU Have on the Table?

- Home
- Rental Property
- Other Property
- Cars
- Business Interests
- Equipment
- Land
- Office
- Firearms
- Medical equipment
- Boats
- RVs
- Outdoor Vehicles/Toys
- More



STRATEGY #2

Individual Entities for EACH Asset



STRATEGY #2

Individual Entities for EACH Asset



Home



Boat/RV/Toys



Equipment



Office



Rental
Property



Other...



Example



Single LLC

Multiple LLC's Protect High-Risk Assets



LLC #1



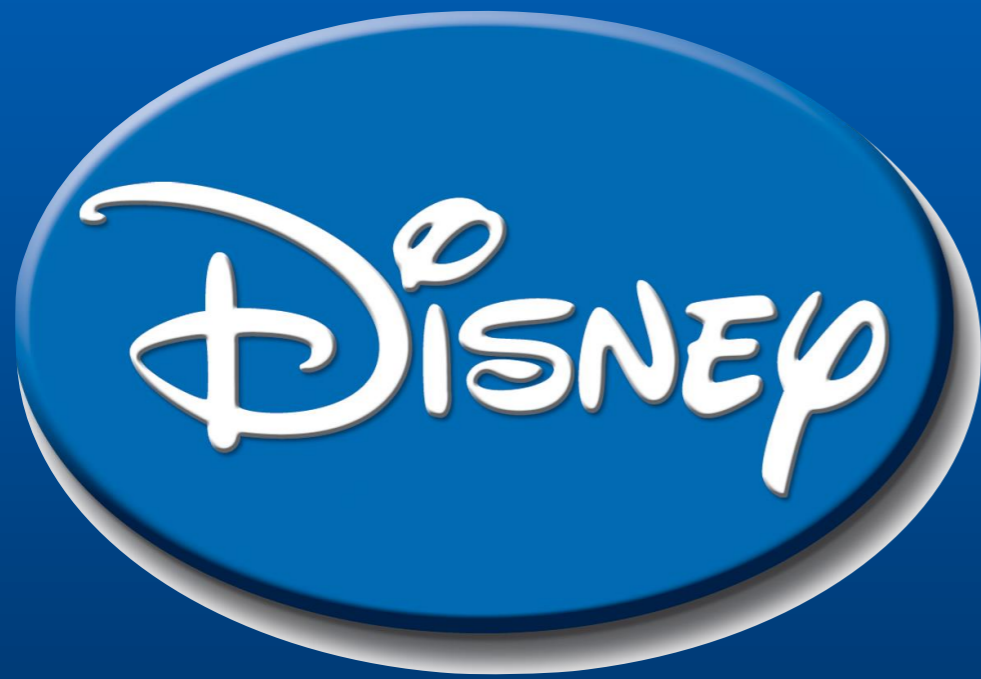
LLC #2



LLC #3



Who Uses This Strategy?



Why Aren't YOU?



When there is NOTHING to get,
there is NO lawsuit!



99% Safe Assets
Locked In FLP



100% High-Risk
Assets
Protected by LLCs



Laws to get AROUND or THROUGH Your Asset Protection

- Judges can “pierce the corporate veil” in “closely-held” corporations
- In 45 out of 50 states a judge can dissolve your entity?





STRATEGY #3

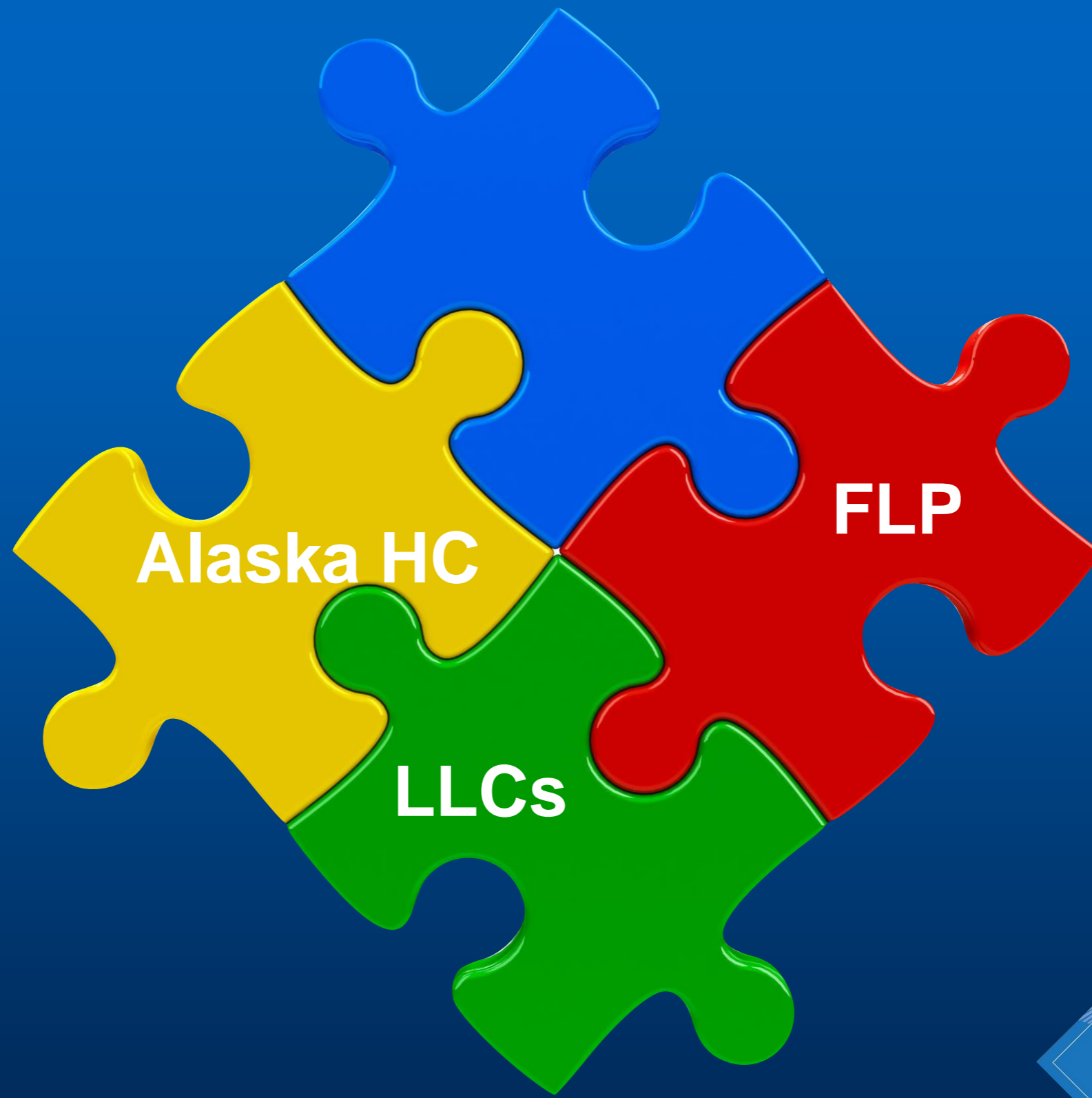
Alaskan Holding Company



Alaskan Holding Company

- Anonymity Clause
- No Dissolution
- Not likely to change!





Trial Attorney's Answer...

Pass a Law to Take Control: The Charging Order

Passed in each individual state, gave the Judge the right to force a **Pro-Rata Distribution** and order the defendants share of the income to the plaintiff.





STRATEGY #4

Non Pro-Rata Distribution



Non Pro-Rata Distribution



NON-Pro-Rata Distribution Clause stipulates that *only* the General Partner can order a distribution.



Trial Lawyers Fought Against Non Pro-Rata Language



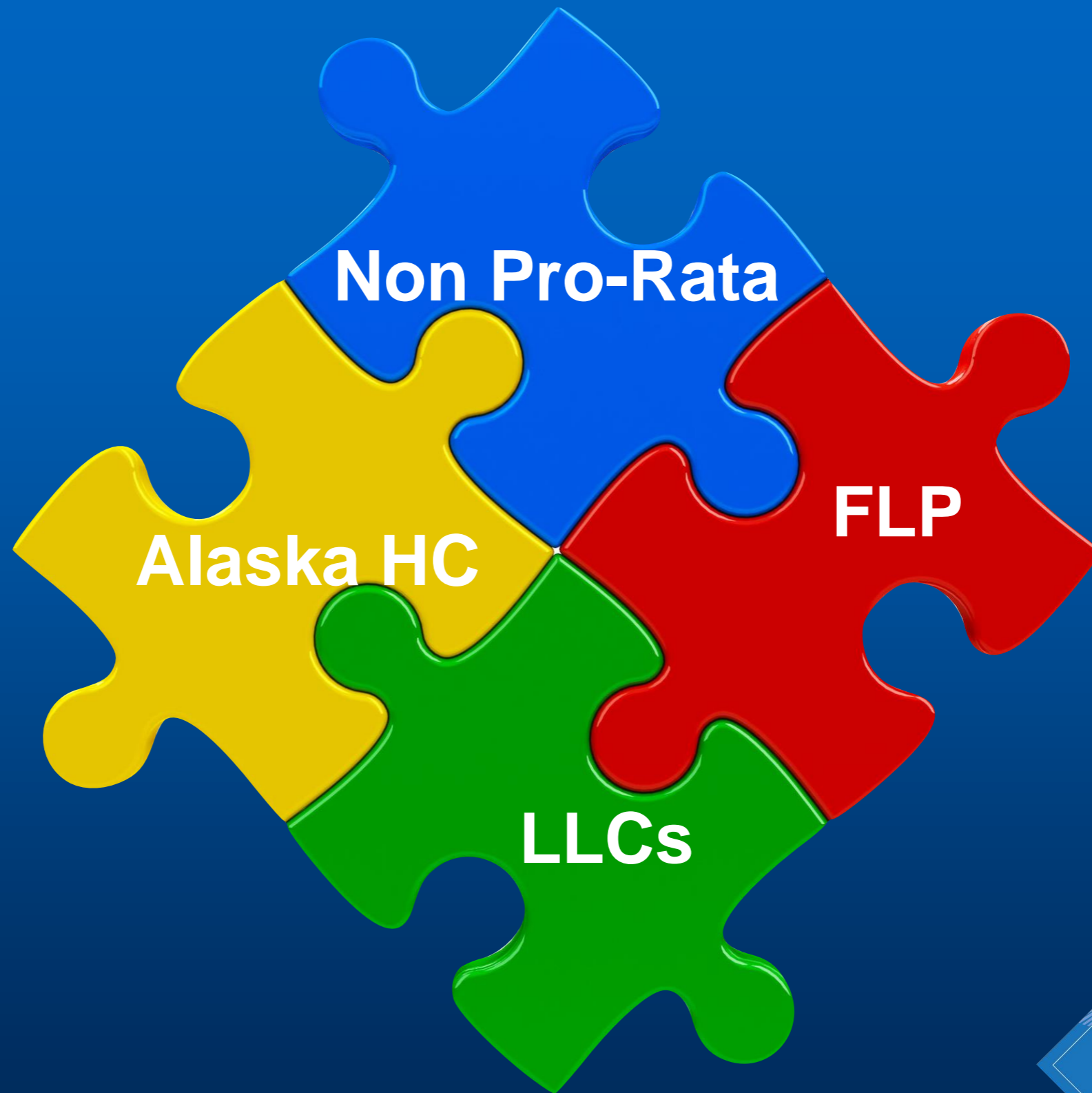
Supreme Court ruled 9-0 in favor of the
Non Pro-rata Language for our Clients!

Non Pro-Rata Language Creates a HUGE Advantage!

IRS Ruling 77-137

A plaintiff using the charging order will have to pay income tax on ANY monetary judgement even if there is no distribution from the defendant.





Let's Have Fun...Let's Talk Taxes



“It is the responsibility of every American citizen to ensure they do not overpay their taxes.”

Internal Revenue Service

How can YOU pay less in taxes?



- Leverage your asset protection
- Tax Advantaged Estate Planning



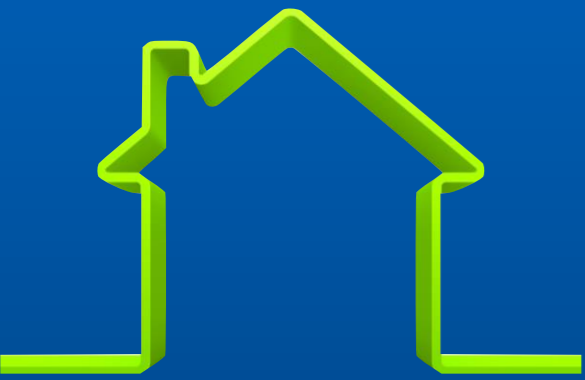
Estate Planning: Living Trust



- Protect everything AFTER death
- Not disputable
- Avoids PROBATE!



How do you capture ALL your Tax Benefits?



Estate
Planning
(Living Trust)



FLP



LLCs



Holding
Company



Other
Entities

Tax Strategist!

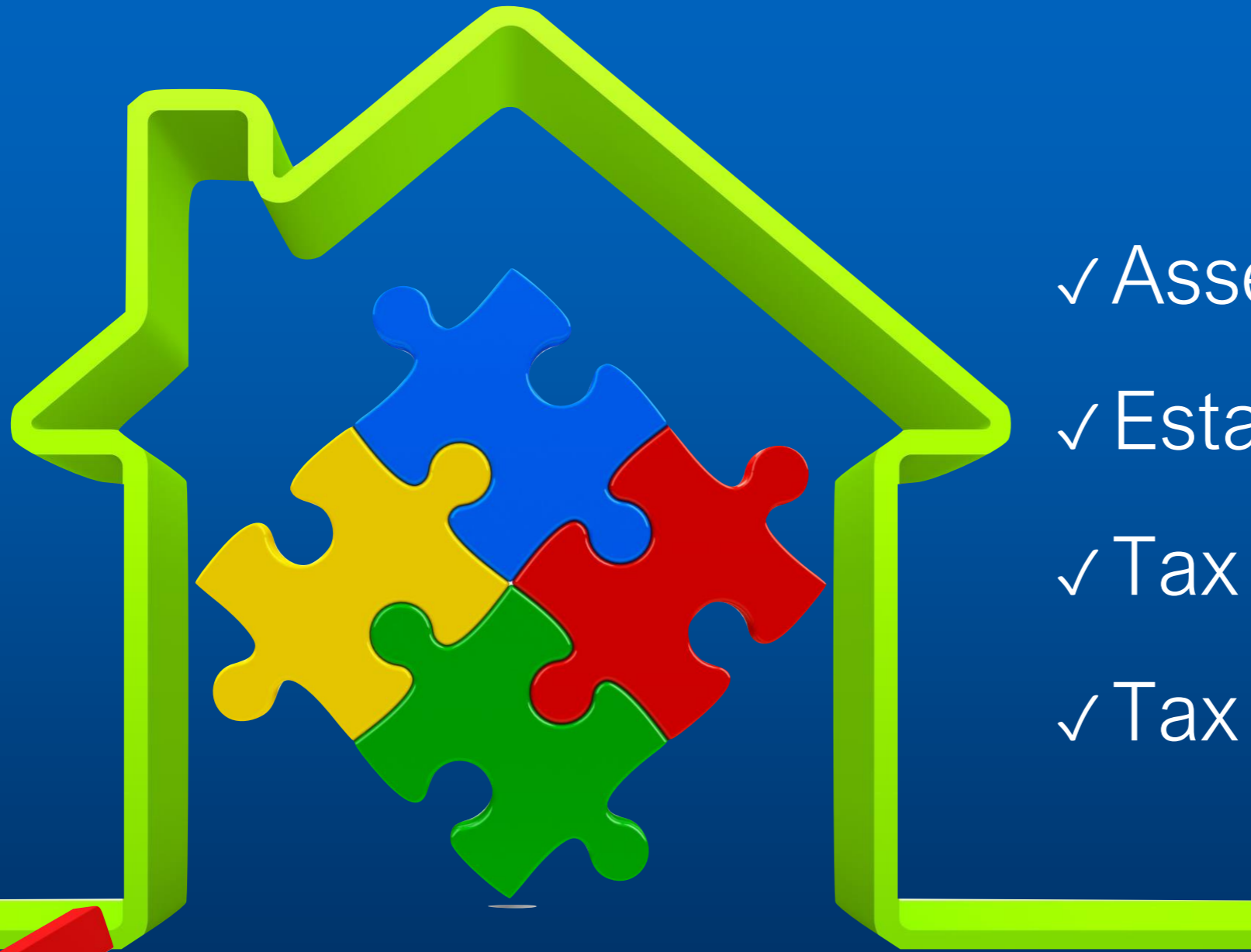


Some Tax Strategies



- IRC Section 280(a)(g) Renting Home for business meetings
- Income Shifting for College and Minors
- FICA Tax Reduction Using an S-Corporation Salary
- Captive Insurance Plan Ownership

We work with your CPA to identify
\$THOUSANDS of dollars in tax savings!



- ✓ Asset Protection
- ✓ Estate Planning
- ✓ Tax Strategy
- ✓ Tax Savings \$10k+



Regular Attorney: \$25,000+



Estate
Planning
\$5-10K



FLP
\$7-10K



LLCs
\$2K Each



Holding
Company
\$2-3K

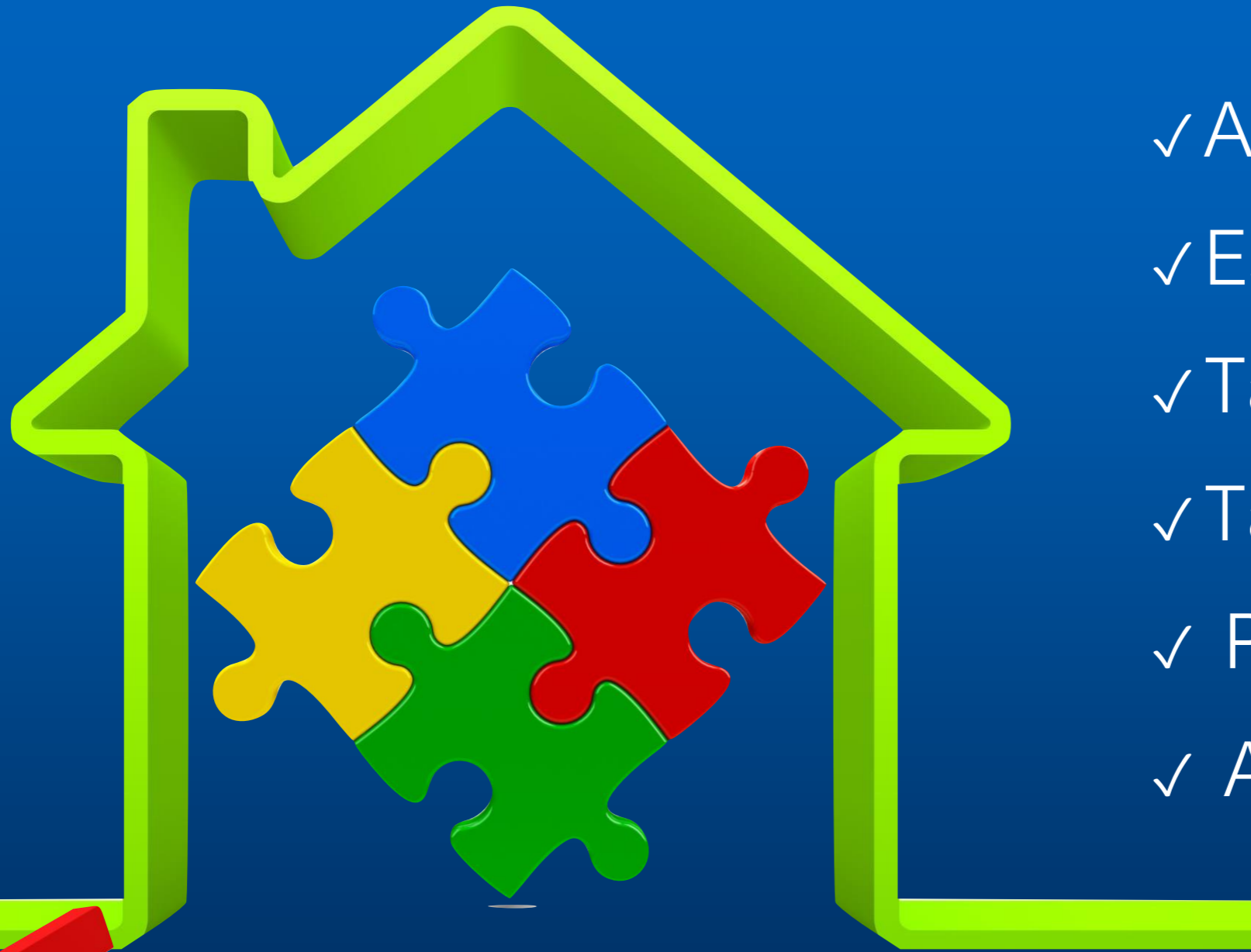


Other
Entities
\$2-3K

Ala Carte, Billed by Hour



One Price: \$13,800



- ✓ Asset Protection
- ✓ Estate Planning
- ✓ Tax Strategy
- ✓ Tax Savings
- ✓ Peace of Mind
- ✓ And more



License Protection



- HIPPA, OSEA, Medicare automated compliance
- SHIELD for malpractice mitigation



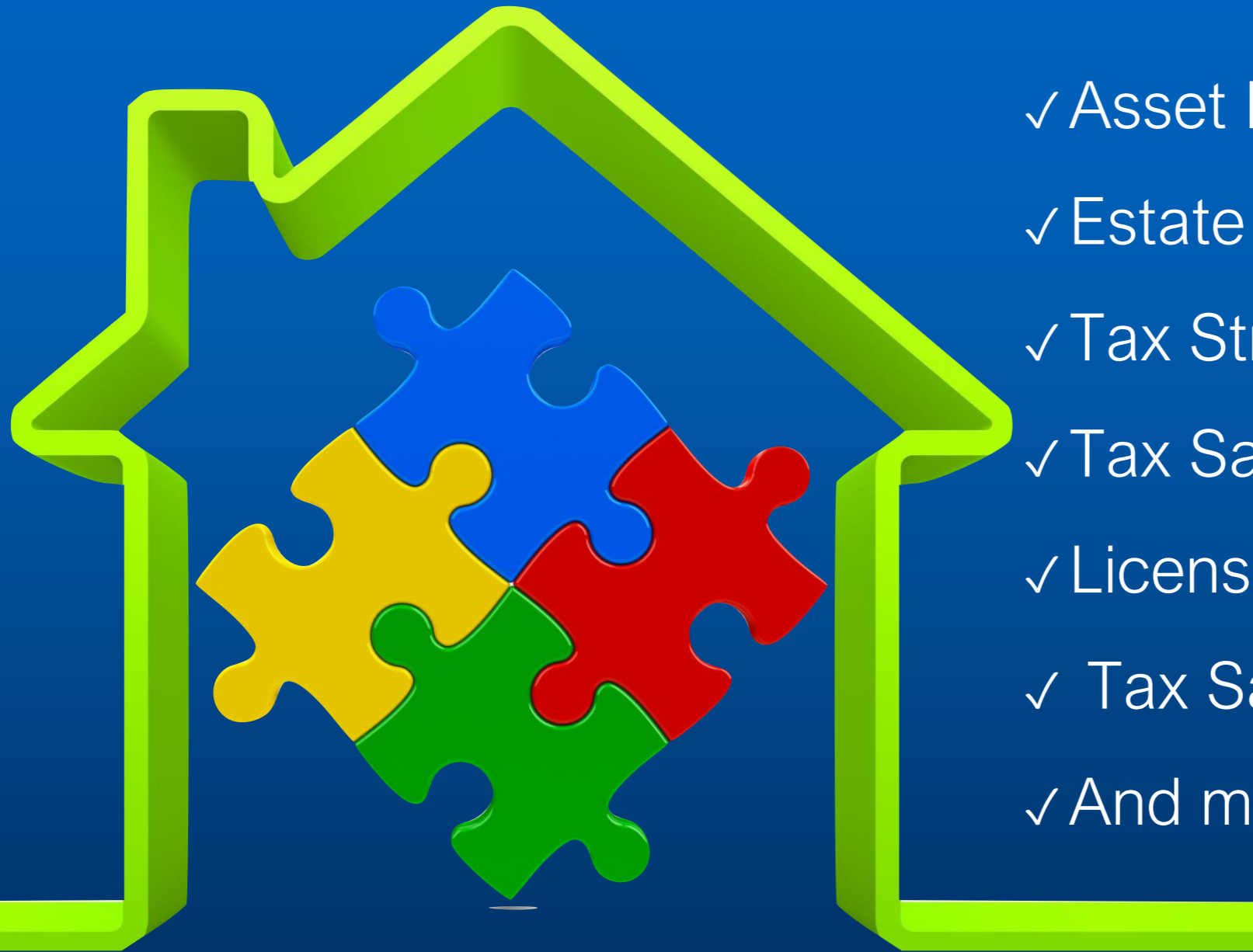
One Price: \$13,800



- ✓ Asset Protection
- ✓ Estate Planning
- ✓ Tax Strategy
- ✓ Tax Savings
- ✓ License Protection
- ✓ And more



Event Price: **\$8,400**



- ✓ Asset Protection
- ✓ Estate Planning
- ✓ Tax Strategy
- ✓ Tax Savings
- ✓ License Protection
- ✓ Tax Savings Guarantee
- ✓ And more



\$8,400 Tax Savings Guarantee



- ✓ You WILL save \$8,400 on your taxes or we will give you back the difference
- ✓ You redirect \$8,400 of tax dollars to pay for your estate planning, asset protection, tax strategy, license protection, and management
- ✓ You then receive \$8,400 of tax savings, or we write you a check for the difference

YOU WILL NOT PAY FOR THIS!

“The staff was personable and quick to respond, and they accounted for much more than I had anticipated. **Our accountant has been very pleased...in the end we are saving more than TWICE the cost of the program in tax savings each year.** I am VERY happy with the outcome and have recommended Legally Mine to all the other professionals in my association.”

Dr. Mac



\$8,400 Tax Savings Guarantee



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- ✓ You redirect \$8,400 of tax dollars to pay for your estate planning, asset protection, tax strategy, license protection, and management
- ✓ You then receive \$8,400 of tax savings, or we write you a check for the difference

YOU WILL NOT PAY FOR THIS!

\$8,400 Break Down

\$6,000 = Pay it Once and NEVER Again

- Unlimited Entity Creation (now and in the future)

\$2,400 = 1-Year of Premium Plus Services

- Personalized Asset Protection Strategy
- Management of Your Asset Protections (minutes, renewals, consulting)
- Personal Tax Reduction Strategy
- Access to staff, attorneys, and tax strategist (Your estate, asset, and tax attorneys on retainer)
- HIPAA, OSHA & Medicare Automated Compliance System
- SHIELD License Protection (Malpractice Risk Mitigation)

\$8,400 Tax Savings Guarantee or your money back

Hire Us Today... We Start Now!

- ✓ 60-80 hours of our time
- ✓ 3-4 hours of your time
- ✓ 2-3 months to completion



1337 E. 750 N. Orem, UT 84097
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Event/Association Meeting:

Name: (print) _____ Email: _____

Address: (billing) _____ City: _____ State/Zip: _____

Home Phone: _____ Cell Phone: _____ Work Phone: _____

PREMIUM+	
12 MONTHS OF SERVICE:	\$200 ⁰⁰ /mo.
	\$2,400 ⁰⁰ upfront

ENTITY CREATION CAP	
Unlimited Entity Creation Includes Tax Savings Guarantee	\$6,000 ⁰⁰

As a member of Premium+ I will receive:

INITIAL: • Asset Protection Blueprint • Tax Impact Plan • License Protection Review • Living Trust Review or Planning Session

ANNUAL REVIEWS FOR: • Asset Protection • Tax Savings • Trust Updates

CONTINUED UPKEEP FOR: • Entity Renewals (does not include payment of state fees) • Qualified Registered Agent Services • Minutes & Meeting Outlines • Online Software Updates

ACCESS TO: • Legally Mine Legal Staff • Carepoint Group Purchasing Membership • EPICompliance – HIPAA, OSHA & Medicare Automated Compliance System • Physical Documents & Legal Binders Created & Delivered • Monthly Newsletter • Advanced Tax Planning Specialists

By purchasing the Entity Creation CAP I will receive:

Access to over 100 specially designed legal documents through mylegalstronghold.com. Included with my purchase of the Entity Creation CAP I will also receive complimentary service pertaining to the creation of legal entities, and support for legal documents, within the scope of Legally Mine.

By checking this box, I am enrolling in Premium+ and agree to be billed \$200.00 per month (or \$2,400 per annum) for the minimum required twelve months. This term shall be in effect as of the date of this signed agreement. I may discontinue this service, after my initial contracted term, by adhering to the termination procedures found in the "Terms and Conditions" on the reverse side of this agreement.

By checking this box, I am purchasing the Legally Mine Entity Creation CAP and agree to pay the amount listed above.

I am authorizing Legally Mine to make monthly automatic payment withdrawals in the amount of \$_____/mo. for 11 remaining months.

X _____

TOTAL:	\$8,400.00
TOTAL collected at event:	\$

METHOD OF PAYMENT

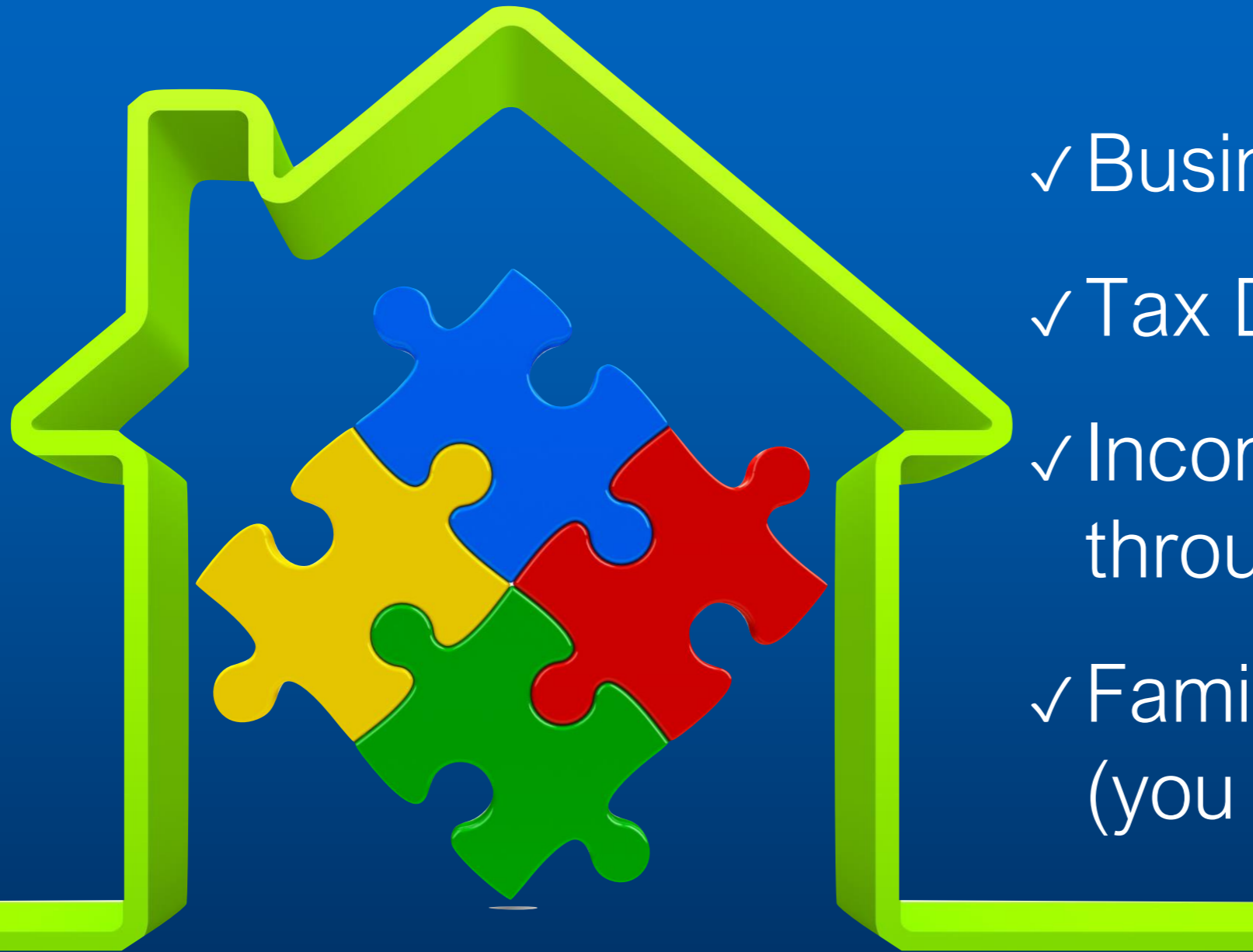
Check#: _____ Process via credit card:

CC#: _____

I hereby authorize Legally Mine to process my selected Premium+ and/or Entity Creation CAP payments in exchange for the products and services listed above. By signing below, I understand that, unless specified in writing, **ALL SALES ARE FINAL**. I understand that all transactions related to this agreement are business-to-business and not consumer transactions, as I am intending to create and operate new business entities. I also acknowledge I have read, understand, and agree to the terms described in the "Consent to Binding Arbitration," and "Terms and Conditions" sections on the reverse side of this Agreement.

Signature: _____ Date: _____ Product Packet Received (initial) _____

Event Price: **\$8,400**



- ✓ Business expense
- ✓ Tax Deductible
- ✓ Income generating through tax Savings
- ✓ Family Benefits (you and spouse)





“As surgeons, we spend a lot of time caring for other people. For Example, did Mrs. Jones get her Coumadin or did Mr. Smith get his Doppler? One thing we often forget, is to remember to take the time to take care of ourselves and our families. Legally Mine was first suggested to me by my accountant. He thought their asset protection and tax strategies would be an ideal way to limit potential litigation and minimize tax liability.

Dr. Bryan Hanypsiak

Editor-in-Chief, The American Journal of Orthopedics



“But it wasn’t until I heard their presentation at an Orthopedic course in Las Vegas, that I realized they would be an integral part of my estate and tax planning, asset protection, and malpractice mitigation. After hearing the presentation, I immediately signed up for the service and it has exceeded my expectations. The staff made it painless to manage, handling everything from entity creation to running legally required advertisements in public newspapers. When the plan was finalized, it was presented in a binder with step by step instructions which I reviewed with Legally Mine’s legal team.



While most practicing physicians understand the importance of asset protection, so few take the time to act on it, until it's too late. That's why I chose Legally Mine to set up my plan, allowing me to focus on my practice. Now that my assets are protected, my estate is in order, and I have an entity lawyer on retainer for all of my corporation's needs, I can get back to worrying about Mrs. Jones."

Dr. Bryan Hanypsiak

Editor-in-Chief, The American Journal of Orthopedics



Do you want to be forced to find your number
when you know \$8,400 is a way out?

\$8,400

- ✓ Asset Protection
- ✓ Estate Planning
- ✓ Tax Strategy
- ✓ Tax Savings
- ✓ License Protection
- ✓ Management
- ✓ Tax Savings Guarantee
- ✓ Fully Tax-Deductible

