



**Post-con  
Webinar**

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# Unstoppable Growth Conference

 lightyeardocs  @LYD\_Docs  @LYDocs **#LYD24**



**BEST SOCIAL SHARER PRIZE WINNER**



**THE PRIZE GOES TO:**

**PAUL  
TALKINGTON**

**CONGRATULATIONS!**



# UNSTOPPABLE GROWTH

- Unstoppable

*.....impossible to stop or prevent.*

- Growth

*.....increase in economic activity or value*

*.....the process of increasing in amount, value, or importance*

*.....the process of developing physically, mentally, or spiritually.*

# **BONUS LESSON: PROTECT YOUR ASSETS**

- Family Wealth Protection Work is a Gold Mine
- Estate Planning is heavily litigated
- Build for the Next Generation
- Child Maintenance Trusts are Gold
- \$3M Super Wealth Tax



 **THE \$7 TRILLION**  
**WEALTH TRANSFER**  
WITH ANDREW INWOOD

NOTES:

KEY TAKEAWAYS:



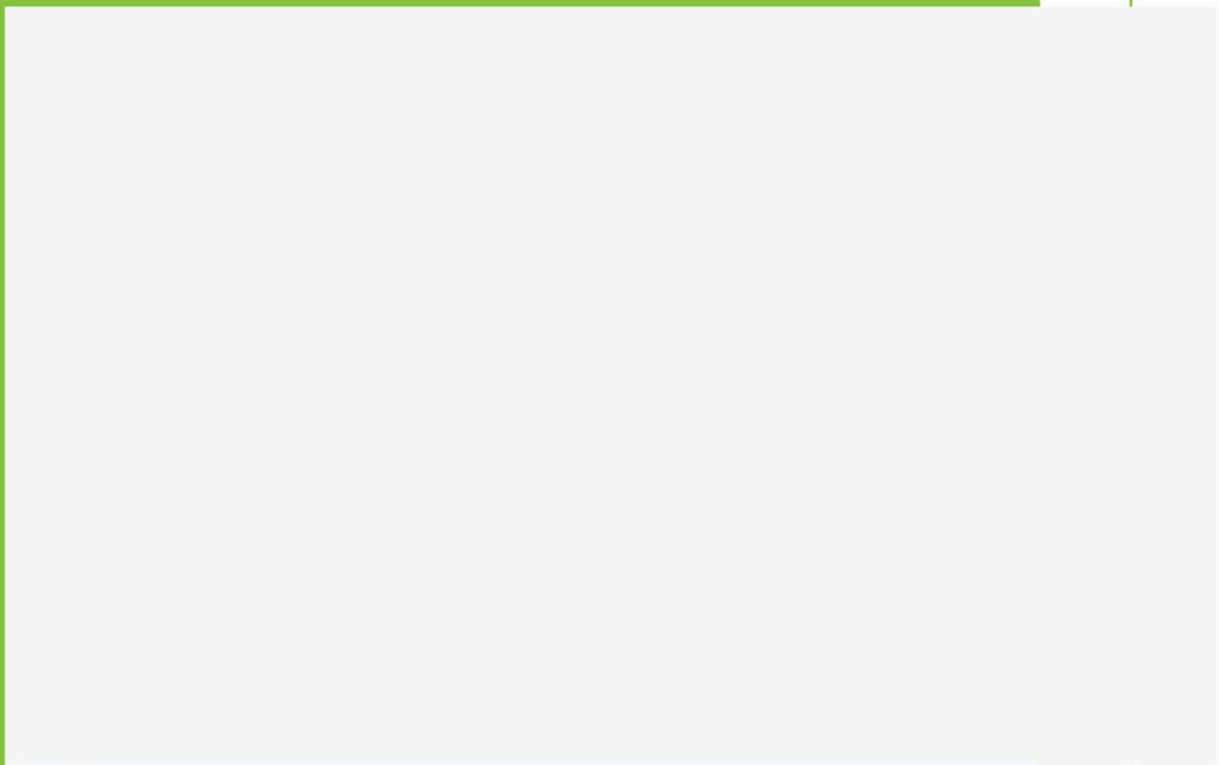
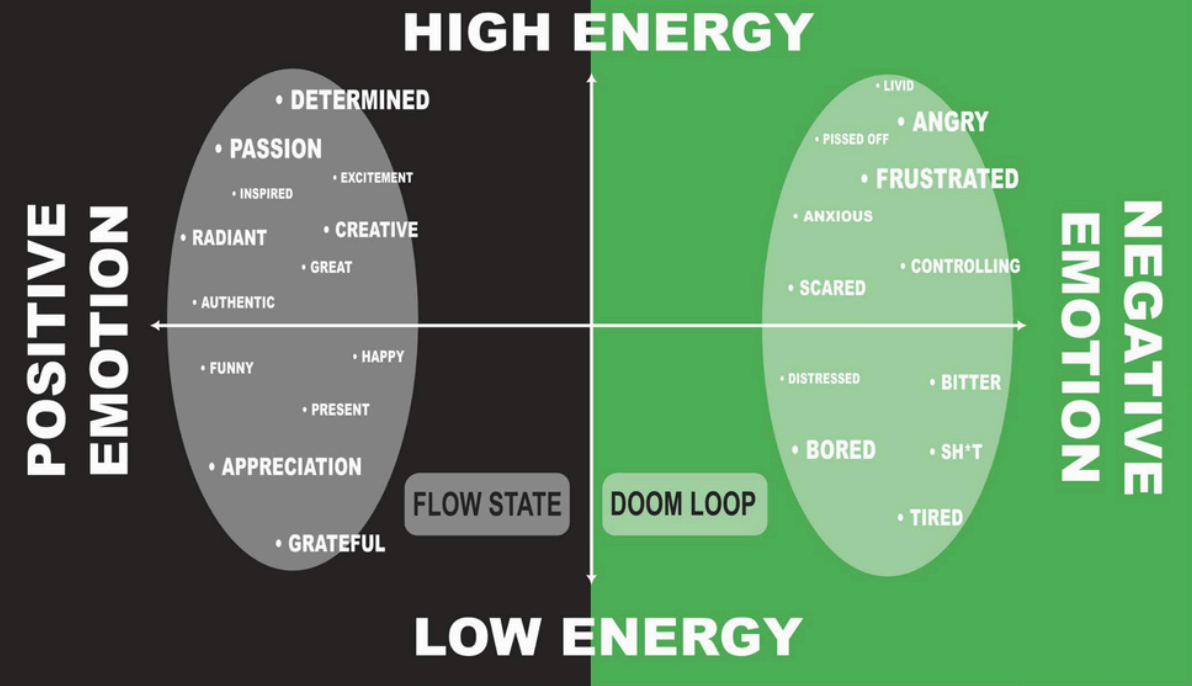
**“Doesn’t matter  
how good your  
f\*\*k’n ideas are, if  
you can’t  
sell or articulate  
them.”**

*Simon Beard*



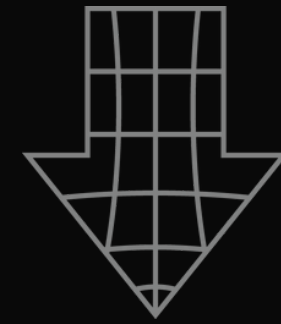
GOAL MASTERY  
**WORKSHOP**

WITH SIMON BEARD

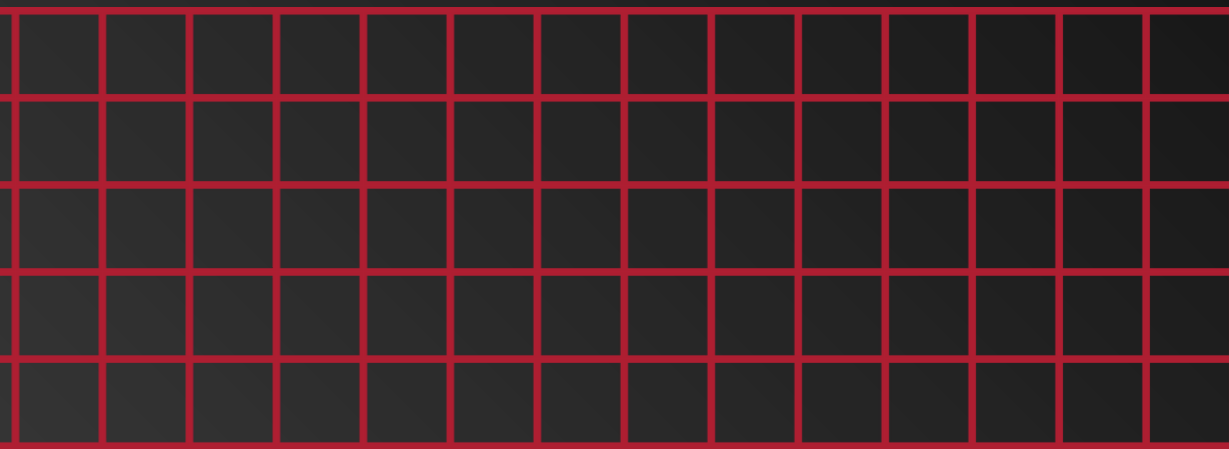




# PURPOSE



**YOUR WHY UNLOCKS  
ENERGY**



SIMON  
BEARD

# ACTION STEPS

- 1** **PRIORITISE TASKS**
- 2** **SCHEDULE OUTCOME-FOCUSED TIME**
- 3** **INITIATE COMMUNICATION**
- 4** **ENSURE MOMENTUM**

SIMON  
BEARD

# CLARIFY WITH OUTCOMES

**1**

**LIST WEEKLY OUTCOMES**

**2**

**DEFINE METRICS**

**SUCCESS + QUALITY + QUANTITY**

**S I M O N  
B E A R D**

# LESSON 2: SIMON BEARD'S GOAL-SETTING SYSTEM

## REFLECTION

WHAT YOU DID WELL?

WHAT CAN YOU IMPROVE?

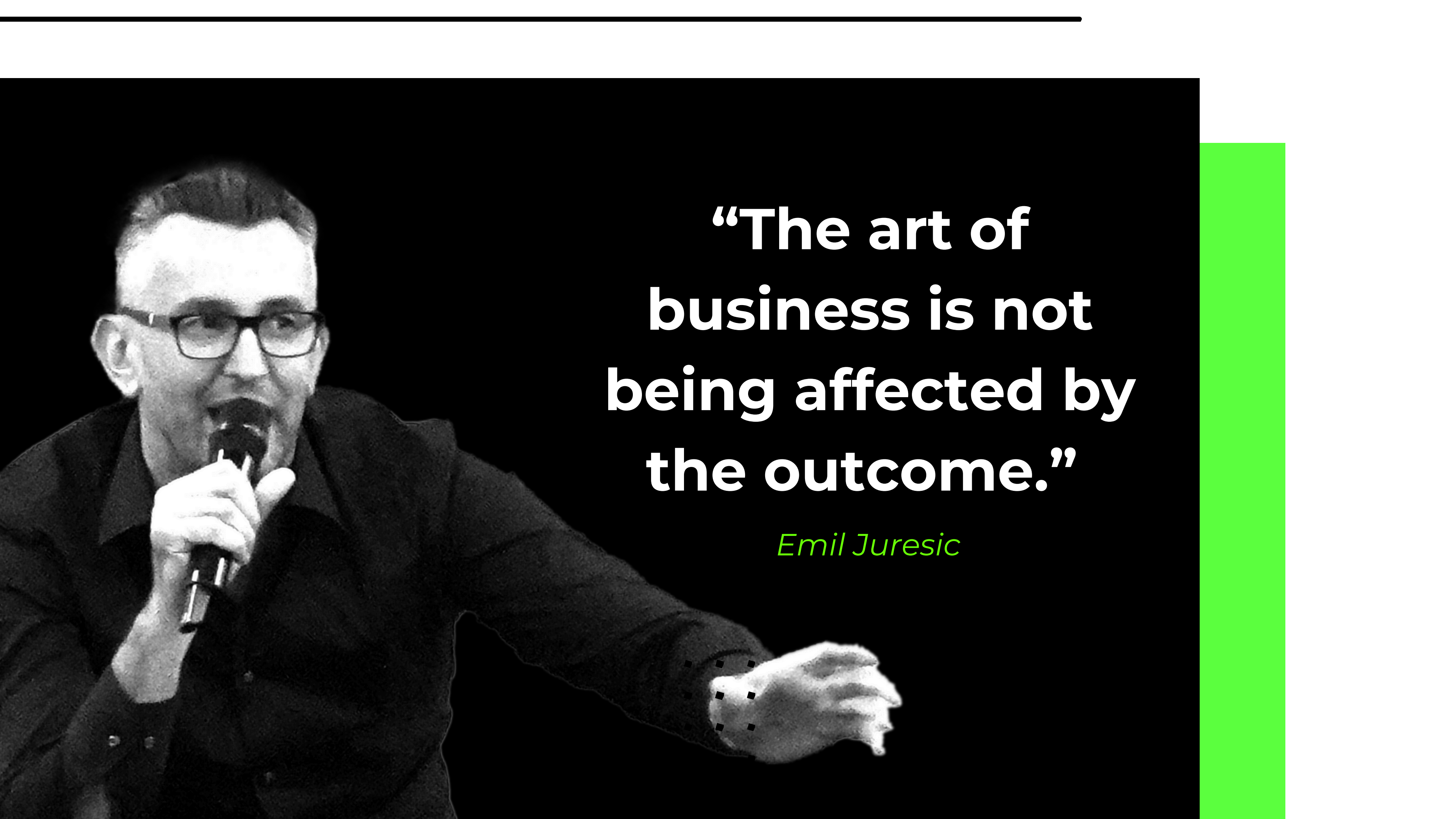
WHAT WAS THE LOW-VALUE  
TIME?

WHAT YOU DIDN'T DO WELL?

WHAT WAS THE HIGH-VALUE  
TIME?

SIMON  
BEARD

---



**“The art of  
business is not  
being affected by  
the outcome.”**

*Emil Juresic*



ONE LIFE

LIMITLESS OPPORTUNITIES

NOTES:

Large empty rectangular area for notes.

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# UNLEASH 10X POTENTIAL PANEL

GROWTH STRATEGY 1:

GROWTH STRATEGY 2:

GROWTH STRATEGY 3:

GROWING MY BUSINESS IN FY 24-25:

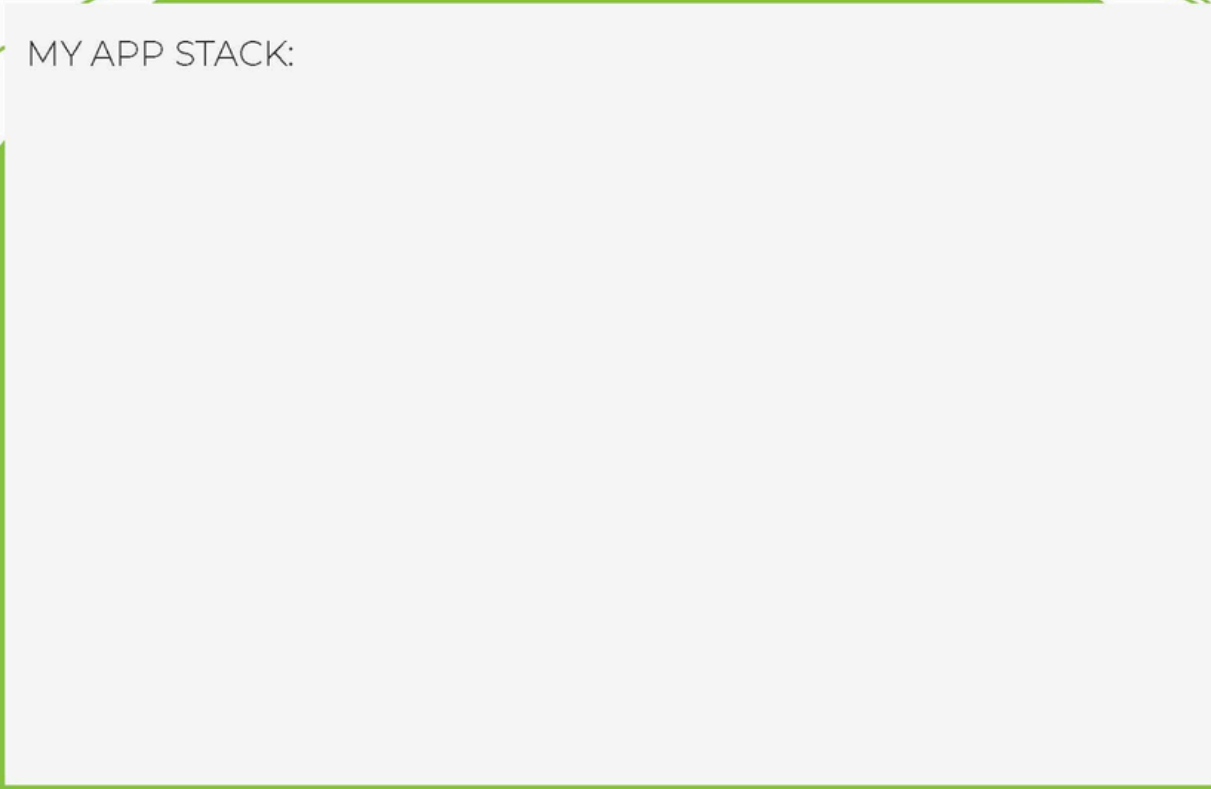




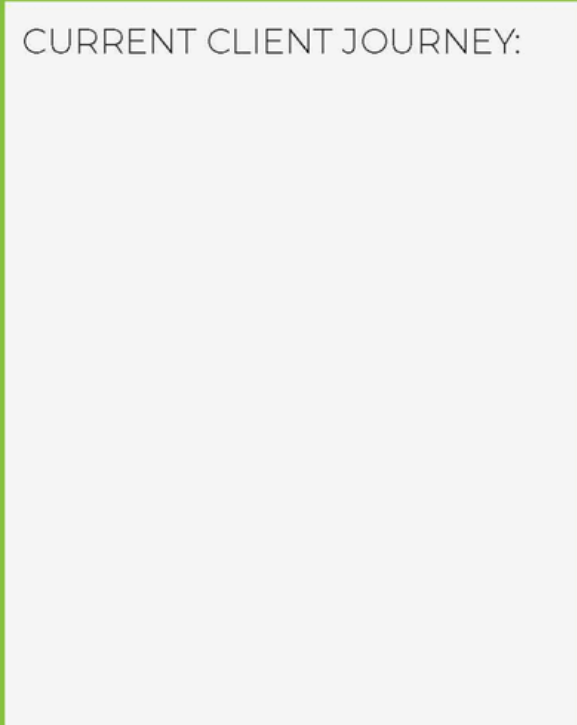


# STREAMLINING **SUCCESS**

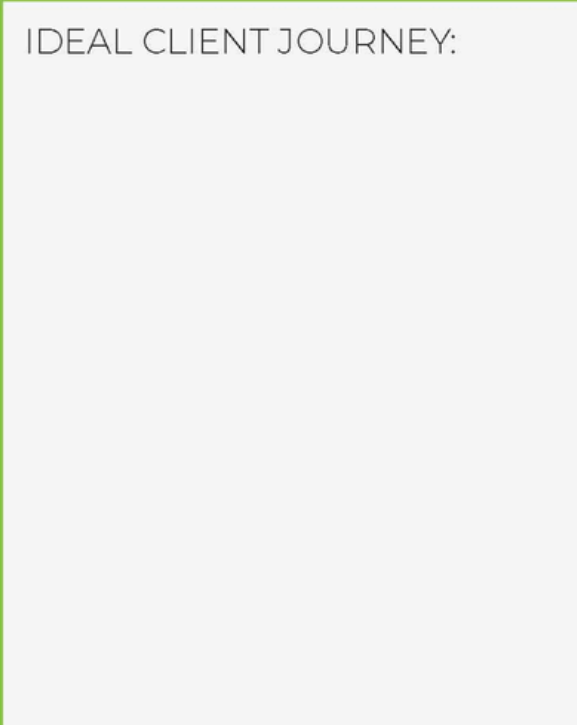
MY APP STACK:



CURRENT CLIENT JOURNEY:



IDEAL CLIENT JOURNEY:



- 
- 
- 
- 
-

# SURVIVING THE ODDS WITH MICHAEL JEFFRIESS

WAYS TO HAVE MY BUSINESS RUN AUTONOMOUSLY:



WHAT IS MY BIG "WHY?":

WHAT IS MY EXIT STRATEGY OR SUCCESSION PLAN?



**UNLEASH**  
**EXPONENTIAL GROWTH**  
WITH MARK BOURIS

I CAN 10X MY GROWTH POTENTIAL BY:

MY WELLNESS STRATEGY (WHEN, HOW, WHY):





# ACCELERATING YOUR WEALTH PROTECTION STRATEGY

WITH GRANT ABBOTT

TOP STRATEGIES THAT APPLY TO ME:

Blank white rectangular area for notes.

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# ROAD TO BUSINESS & REVENUE SUCCESS

## FIRST YEAR

### EXAMPLE:

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	\$ 650.00	50%	50	\$ 32,500.00
Trustee Distribution Resolution (annual)	\$ 250.00	100%	100	\$ 25,000.00
SMSF Trust Deed Upgrades	\$ 650.00	30%	30	\$ 19,500.00
Company Set ups	\$ 1,500.00	50%	15	\$ 15,000.00
Company set ups with Successor Director	\$ 2,500.00	50%	50	\$ 125,000.00
<b>Total Potential Value of Strategic Foundation Strategies</b>				<b>\$ 217,000.00</b>

**Total Value of Strategies** \$ 217,000.00

Leading Member - Asset Protection - best as a certified SAPEPAA Adviser	Average Price	Conversion Rate	Number of Clients	Total
Leading Member discretionary trust with LM trustee company	\$ 3,200.00	20%	20	\$ 64,000.00
Leading Member discretionary trust upgrade	\$ 2,200.00	50%	50	\$ 110,000.00
Successor Director Solution with Indemnity	\$ 950.00	100%	100	\$ 95,000.00
The Protector per property	\$ 5,500.00	50%	50	\$ 275,000.00
The Business Protector	\$ 9,500.00	50%	50	\$ 475,000.00
Leading Member SMSF with LM trustee company	\$ 3,200.00	20%	20	\$ 64,000.00
Leading Member SMSF deed upgrade	\$ 2,200.00	20%	20	\$ 44,000.00
The UPE Protector	\$ 2,200.00	50%	50	\$ 110,000.00
The Enforcer for Companies	\$ 3,300.00	50%	50	\$ 165,000.00
<b>Total Potential Value of Leading Member Asset Protection Strategies</b>				<b>\$ 1,402,000.00</b>

Estate Planning and EPOAs	Average Price	Conversion Rate	Number of Clients	Total
Couples "go to" Will with EPOA and all purpose Testamentary Trust	\$ 3,200.00	50%	50	\$ 160,000.00
Couples Will with Multipl Testamentary Trust and EPOA	\$ 4,400.00	35%	35	\$ 154,000.00
SMSF Will with Testamentary Trust	\$ 2,200.00	50%	50	\$ 110,000.00
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 Estate Planning Strategies</b>				<b>\$ 549,000.00</b>

**Budgeted Revenue** \$ 2,168,000.00

# YOUR DETAILS:

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

Yes!

How many business clients do you have?

xfv=dcx

The Strategic Foundation	Average Price	Conversion Rate	Number of Clients	Total
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Family Allowance Agreement				
<b>Total Potential Value of Estate Planning Strategies</b>				

**Budgeted Revenue** \$



MARKETING

**BEYOND 10X**

WITH MICHAEL JEFFRIESS & BEN GILL

HOW TO REACH MORE PEOPLE:



INTERACTIVE STRATEGY  
**CASE STUDIES**  
WITH GRANT ABBOTT & ROD PETERS





# CLIENT JOURNEY MASTERCLASS

THE FIVE STAGES OF CUSTOMER JOURNEY



AWARENESS



CONSIDERATION



CONVERSION



RETENTION



ADVOCACY



Find the **WE♥MARKETING**  
Experts at the conference for  
your **FREE** business  
marketing audit.

Your **WE♥** Score:

Website:	<input type="checkbox"/>	_____
Social Media:	<input type="checkbox"/>	_____
Partnerships:	<input type="checkbox"/>	_____
Referrals:	<input type="checkbox"/>	_____
Email Marketing:	<input type="checkbox"/>	_____
Branding & Design:	<input type="checkbox"/>	_____
Communications:	<input type="checkbox"/>	_____
Google Presence:	<input type="checkbox"/>	_____
SEO:	<input type="checkbox"/>	_____
Traditional Marketing:	<input type="checkbox"/>	_____
Strategy & Reporting:	<input type="checkbox"/>	_____
<b>TOTAL:</b>	<input type="checkbox"/>	_____



Contact Us:  
1300 590 388  
connect@welovegroup.com.au  
www.welovegroup.com.au/marketing



**LESSON 1:  
AS A BUSINESS OWNER, ZOOM OUT**

The logo for Lightyear, featuring a green lightning bolt icon followed by the word "lightyear" in white lowercase letters and "docs" in smaller green lowercase letters below it.

# MICHAEL'S STORY

Exclusive story of returning from a cardiac arrest in a recent real-life case study.



# ZOOM OUT

- Strategy
- Amplification & Marketing
- Relationships

**DON'T GET BOGGED DOWN IN MINUTIAE**

# LESSON 2: HEALTH FIRST

# WELLNESS MATTERS

**Sleep**  
**Hot/cold Therapy**  
**Nutrition**  
**Sunlight**  
**Movement**  
**Breathing**  
**Social activity**  
**Hobbies**



**LESSON 3:  
GOAL-SETTING EVERY  
SUNDAY**





## LESSON 4:



**BUILD A BRILLIANT BRAND BEFORE  
YOU START MARKETING**

# CREATE BRAND RECALL IN THE MARKETPLACE

- Visual branding
- Brand voice
- Unique selling propositions
- Catch cries
- Logo
- Consistency
- Slogan
- Social templates



# GET CLEAR MARKETING GOALS

- Create brand awareness
- Build email list
- Nurture current audience
- Increase enquiry
- Go wider - Collaborate with partners



# **WE** **MARKETING**

**Get a free Marketing Audit**  
**[www.welovegroup.com.au/marketing](http://www.welovegroup.com.au/marketing)**



# LESSON 5: 10X YOUR SALES TARGETS

**BUILD A SALES  
CALL WORKFLOW**

**COLLABORATE  
WITH BIG NAMES**

**UPLEVEL YOUR  
CLIENTS**

**FOCUS ON CLIENT  
GAINS**

**CLOSE WITH  
EMOTION AND LOGIC**



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# GET THE UNSTOPPABLE GROWTH MENTOR PACKAGE

 [lightyeardocs](https://www.instagram.com/lightyeardocs)  [@LYD\\_Docs](https://www.linkedin.com/company/@LYD_Docs)  [@LYDdocs](https://www.facebook.com/@LYDdocs)



# UNSTOPPABLE GROWTH MENTOR PACKAGE



BEN GILL



MICHAEL JEFFRIESS

AND MORE...





- Expert Mentorship: 6 x Live Monthly Group Coaching with our Master Trainers including Grant Abbott, Michael Jeffriess, Ben Gill and more. (Value: \$6,000)
- SAPEPAA 3-Day Course: (Value: \$2,495)
- Comprehensive Skill Development - 10 x LYTG Courses: (Value: \$2,950)
- 6 x Monthly Personalised Client Emails: (Value: \$900)
- Marketing and Branding Consultation: (Value: \$500)
- Value-add Strategy Session: (Value: \$1,500)
- Networking Opportunities: (Value: infinite)
- Total Package Value: greater than \$14,000 plus exponential value added to your business - in both income and as a sellable asset.
- Exclusive Deal for Unstoppable Growth Conference Attendees: \$2,500

**ONLY 25 SPOTS AVAILABLE.**



**BEST SOCIAL SHARER PRIZE GOES TO...**



**Unstoppable  
Growth  
Conference**

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