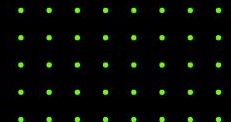
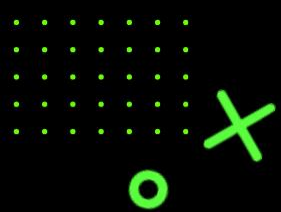
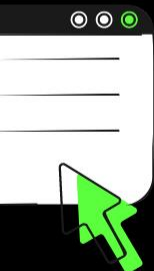




# MAXIMISING THE BENEFITS OF LYD: A GUIDE TO OPTIMAL RESULTS

19 JULY, 2023

10:00AM AEST



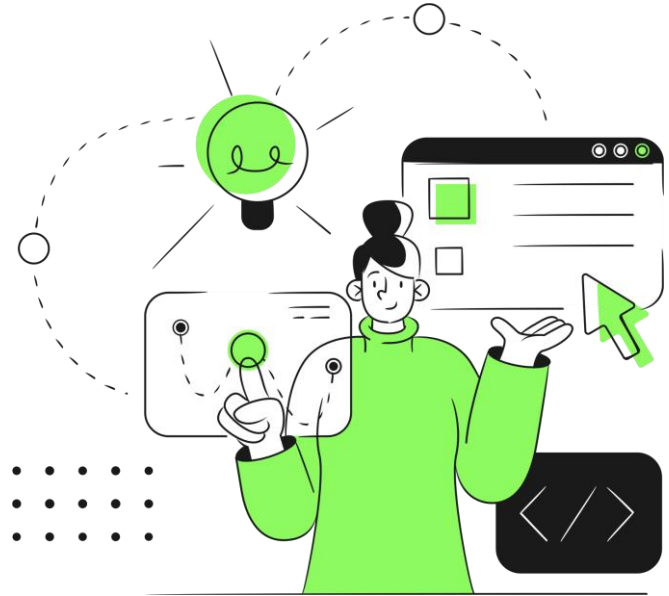
# We're passionate about bettering businesses.

## Today's Agenda

1. Maximising the Benefits
2. Partner Solutions - Member Benefits
3. Other - SAPEPAA
4. Coming up
5. Questions + Feedback

### **Prize Time!!!**

Provide the best feedback + win



Tim Grover

# W1NNING IS EVERYTHING.



“Winning isn't just about the outcome, it's about the process that got you there.”

“Winning doesn't come from excuses, it comes from hard work and commitment.”

“Winning is not just about being the best, it's about being the best version of yourself.”



timgrover

Interested people  
watch OBSESSED people  
change the world.

# 1. Maximising the Benefits

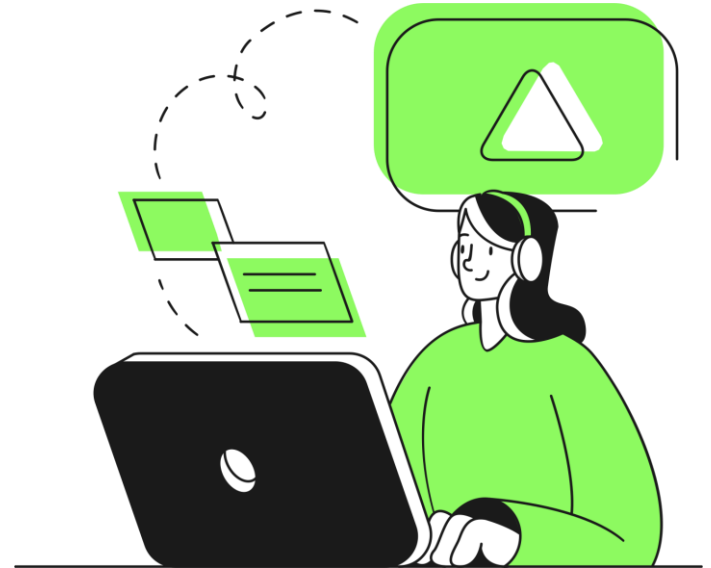


LightYear Group

# Maximising the Benefits.

Providing you with Solutions & Strategies to be your best.

1. LightYear Group Ltd
  - LightYear Docs
  - LightYear Training Group
2. Partner Solutions
  - Member Benefits
3. Other
  - SAPEPAA



LightYear Group

**LightYear Docs.** ◦  
X



## Market leading legal and business document provider

1. Get to know all documents
  - Webinars
  - Training
  - Get a Demo
2. The Success Hub
3. AM Legal Support
  - Process + Costs

**"Everything  
gets easier  
when you stop  
expecting it  
to be easy."**

FEARLESSMOTIVATION.COM  
TIM GROVER

LightYear Group

**LightYear Docs.**



## Market leading legal and business document provider

4. Road to Success Tool
  - Let's jump into it and review it
  - Naked Project
5. Make sure you have the right membership level to Win

**"Everything  
gets easier  
when you stop  
expecting it  
to be easy."**

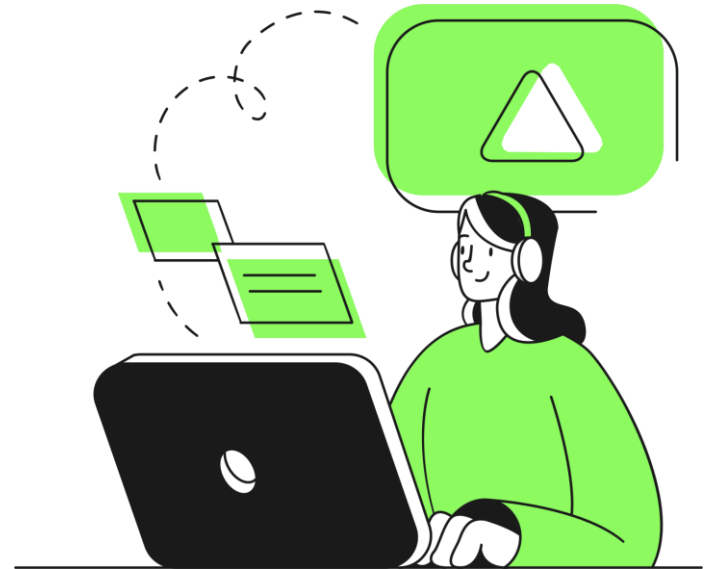
FEARLESSMOTIVATION.COM  
TIM GROVER

LY Surge

**We're ready <sup>o</sup> <sub>x</sub>**  
**when you are.**

**Your one stop customer support hub**

1. Direct conversation with your client success manager.
2. Submit support requests, queries and platform feedback – 7 days a week.
  1. Speak to the experts.
  2. Never miss an important notification from the LYD team.
  3. Collaborate with your team.
  4. Meet our partners.





LightYear Group

# LightYear Training Group.



**Training  
Group**  
lightyear



## Serious Training for Serious Professionals

1. Train to Win
2. The Academies
  - AI Academy
  - SMSF Academy
  - SAPEPAA Academy
  - WLG Academy – coming soon
  - Tax Academy – coming soon

**“Crave the result  
so intensely  
that the work  
is irrelevant.”**

FEARLESSMOTIVATION.COM  
TIM GROVER



## 2. Member Benefits

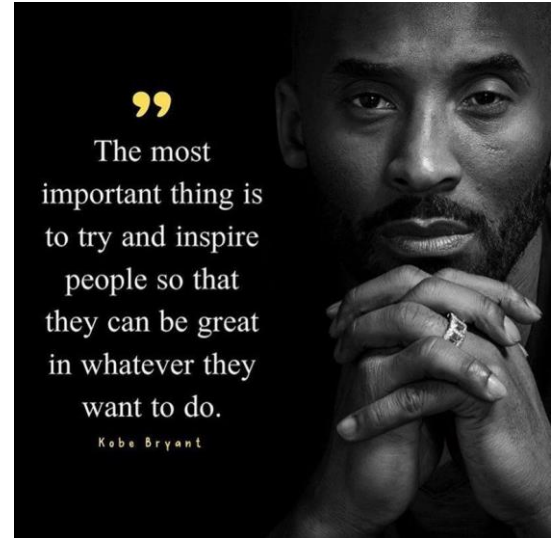


LightYear Group

# Partner Solutions – Member Benefits

We have partnered with the best so  
that you can deliver your best

1. Abbott & Mourly
  - Legal Solutions
  - Tax Lawyer
2. We Love Group
3. Integration Partners
  - Xero, BGL, Fusesign, ATOMate, ChangeGPS





AM  
*Abbott & Mourly*

One of the  
World's most  
innovative legal  
firms

INTRODUCING

ABBOTT & MOURLY  
LAWYERS

Home of Protective Estate Planning,  
Multi-generational Family Protection  
Trusts, digital executors and  
appointors, protection of your  
Likeness from AI.

# Document Lifecycle

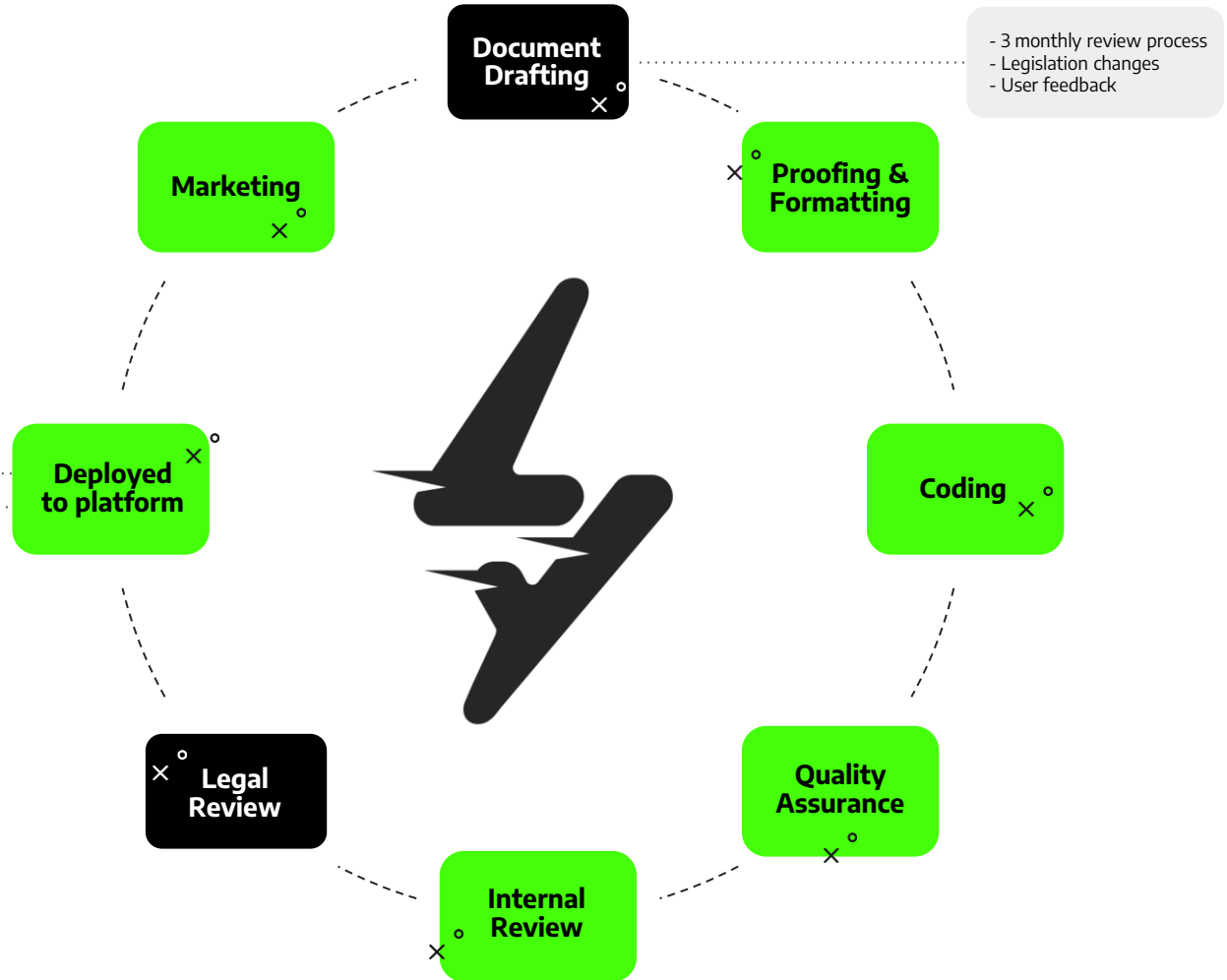
Master template sign off

Additional legal review

*Additional costs apply – AM take over file*

 lightyear

 **AM**  
Abbott & Mourly



**WE♥ACCOUNTING**  
**WE♥BOOKKEEPING**

 eventum optimum  
the best result

**WE♥SMSF**

**WE♥LOANS**

**WE♥LEGAL**

**WE♥HR**

**WE♥COACHING**

**WE♥SUCCESSION**

**WE♥VALUATIONS**

**WE♥**

Providing  
**S**olutions,  
**S**trategies and  
**S**upport to be your  
**BEST**

LightYear Group

# We Love Group: Member Benefits



1. Preferred Pricing Model for LYD Member Firms for all Solutions
2. We Love Group Webinar Series + Training – coming soon
3. Contact:  
e: [connect@welovegroup.com.au](mailto:connect@welovegroup.com.au)  
w. [www.welovegroup.com.au](http://www.welovegroup.com.au)



Providing  
**S**olutions,  
**S**trategies and  
**S**upport to be your  
**BEST**

# What is Australia's Accounting Firm of the Year Implementing in FY2024

- **Project More Love** – LYD Road to Success Tool
  - \* Rollout kicked off yesterday. **Yes** we wanted to do this earlier.
  - \* Webinar to LYD Members – Why, How + What
- **We Love Group Services – Outsource & focus on the value add**
  - \* Eventum Optimum – Client Risk Checklists. Engaging for client meetings where applicable
  - \* We Love Bookkeeping – all bookkeeping outsourced to specialist team
  - \* We Love SMSF – we engage and then outsource to WLS
  - \* We Love Valuations – part of our client packages for Tier 1, add-on for other clients. Part of the DNA of our client journeys.
  - \* We Love Loans – outsource your client lending requirements.
  - \* We Love Coaching – team + client business and leadership coaching

\* We Love Marketing....



# NAKED™

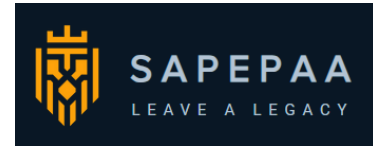
ACCOUNTING





# 3. Other – Jump on board the SAPEPAA Train

LightYear Group  
**SAPEPAA**



1. Do the LYTG Course
2. Become Accredited
3. Join SAPEPAA
4. Come to Phuket in October
5. And if not, outsource to We Love Group (We Love Succession) & AM

**We are SAPEPAA**

Succession, Asset Protection & Estate Planning Advisers Association

# 4. Coming up



# Group CEO Update: Coming up on LYD + LYTG

- New Hard Copy options
- Ignition Proposal Templates!!!!
- Development update
- New Documents + Document review
- Hitting the road with BGL REGTECH Roadshows (1<sup>st</sup>-17<sup>th</sup> Aug)
- Phuket SAPEPAA (Oct 07)
- Success Hub Upgrade
- New eBooks
- And some huge game changers coming.....





# 5. Questions + Feedback Time



 **lightyear** docs