



**ASSET PLANET**  
TURNS DREAMS INTO GOALS

# Agents

# Software Sales

## Opportunity and Statistics

Do you want to make more money and be your own boss while creating your own schedule?

There is a need for a service if you are honest, trustworthy, organized and have basic computer skills.

Go after this opportunity and get well compensated. We know...sounds great!

Asset Planet is a financial software company that helps people “Turn Dreams Into Goals”. We sell subscriptions and part of our sale process is unconventional due to our use of a global salesforce comprised of, digital nomads, entrepreneurs, content creators, influencers, and independent contractors. Throughout the world there are countless individuals who love the hustle of being independent and realize the product that we are offering is a vitally needed service. Our software can positively impact people’s lives and knowing this fact provides the confidence needed to be authentic and great is sales. Asset Planet doesn’t offer games or cute filter plug-ins. Our Mission Statement is “Helping Everyone, Everywhere, Who Earns An Income, Pays A Bill Or Dreams Of A Better Tomorrow™”

Our company’s intention is to feel great about being part of the platform.

- Is this a Multi-Level Marketing company – **No**
- Is this a Franchise – **No**
- Member, Course or Application Fees – **No fees**
- Do I have to buy any inventory – **No**
- Anything perishable – **No**
- Start-up cost – **None, each person decides how they invest their time and money.**
- How else can I make money – **By selling our software, you get a high percentage of every net gross dollar (price collected after discount coupon) and for those Asset Planet Agents that remain in good standing and achieving minimum level sales (see contract), those Agents will receive a trailing commission upon subscription renewal. You get paid while you sleep on every renewal. See detail sheet for examples.**
- What else can I sell besides the WhenIDie.com program? – **Asset Planet will release various software modules over time that create solutions to serve as a person’s daily financial dashboard. An Asset Planet Agent in good standing will be one of the first people given an opportunity to sell added software subscriptions once available. MyLegacyWall.com is currently available for cross selling and commissions by Asset Planet Agents.**
- What if an existing client buys another service or upgrade? **If any sale occurs in a subscriber associated with sale rep ID# then an automatic commission calculation will be assigned based on your payout rate. This should be reflected in the Agent sales dashboard (see screenshot). You get paid for doing nothing while giving the subscriber benefits, they appreciate and need.**
- Am I an employee of the company or Independent Contractor? **Asset Planet Agents are Independent Contractors throughout the world. We don’t tell Independent Contractors how to; dress, talk, when to show-up, how to perform their job, where they decide to work, and who else they can work for as long as that does not pose a conflict as outlined in our contract. We don’t tell our Agents how to price the discount they want to give, but we do curtail the maximum discount that can be given. We don’t tell how Agents invest in their time or money to grow their business. Our Independent Contractors Agreement must be signed and upheld for any Agent to be in good standing with our parent company.**

- Are there Agent legal limitations? **Yes, in our contract you will see multiple clauses that will need to be initialed to acknowledge what sales collateral (e.g. logo, trademarks, other IP) may be distributed in the public domain. Another example is you can't disparage our brand, Another example is Agents can't make unsubstantiated false claims. These types of clauses are very common and can be found in many contracts of similar structure.**
- How can I get my Agent license revoked and lose my agreement and commissions- **See contract.**
- By completing the application am I guaranteed to become an Agent, what is the approval process? **Nobody is guaranteed a free license to become an Asset Planet Agent until they have been reviewed by the internal committee at the corporation. The approval process is dependent on the pace and flow of applications versus whatever automation we can apply to make the process smooth for all concerned. Asset Planet has mapped out a future involving more highly individualized personal services and for this elevated status will require a different approval process. The current license for Agent is software sales only.**
- Can I sell my book of business? **No. (see contract)**
- Can I lose my trails or have my Agent agreement terminated? **Yes (see contract).**
- I have a question not addressed. – **Use Contact-us**
  - **Advertising** – You can spend nothing if you decide on cold-calling or word-of-mouth referral. You may choose to spend a few hundred dollars to join some networking groups, or advertise in print, digital or other mediums. Asset Planet does not suggest or regulate where you choose to promote your business. If you use the Asset Planet logo, then you must use our official artwork which is free to you and accessible. You must also include a disclaimer at least 6pt font (see link) on each advertisement and verbally if the advertisement is audio only. Agents using our Asset Planet logo in an ad must make sure the content is truthful as you will be responsible for any litigation arising from libel if you make misstatements. You will also be subject to having your Agent license revoked if you are found to have been making false and mis-leading statements. If you are unsure of content, Asset Planet offers free reviews of anything to all our certified Agents.

## Potential Profitability for Asset Planet Agent

Theoretical examples of profitability for an Asset Planet Agent are constantly changing based on product mix and offerings. We post on our website a calculator and case examples so that you can determine what you believe is your potential.

## Who and Why?

### Target Markets

1. **Certified Public Accountants, Enrolled Agents, and Bookkeepers**
  - a. **Why** – These professionals are the center of many people's financial decisions, and they are typically interested in any opportunity to deepen the relationship while generating more revenue. In the process they are helping their clients become more organized and secure, which creates a byproduct of loyalty and added trust. Clients being organized also helps their job become more efficient when it comes to time for preparing taxes.

These busy professionals seldom want to use their own time or their internal team staff to sift through paperwork, organize and perform data entry. These professionals are often looking for ways to increase reoccurring revenue while staying within their core competency and not needing new licensing or insurance. Potentially you might be a great source of referrals to them.

**2. Estate Lawyer**

- a. Why – Our software planner has very specific modules designed just for estate planners that are unique and sure to resonate with patriarchs/matriarchs (leaders of families). These busy professionals seldom want to use their own time or their internal team staff to sift through paperwork, organize and perform data entry. As an Asset Planet agent, you can solve a problem for them while also providing additional reoccurring revenue. If their clients were previously seeing them 1-2x every 10 years, our software offers them an opportunity to meet more frequently with valuable updates. Stronger relationship and more revenue while staying within their core skills. Potentially you might be a great source of referrals to them.

**3. Divorce Lawyer**

- a. Why - Our software planner has very specific modules designed just for divorce lawyers that are unique and simple for something that will produce a very complicated financial analysis. During the divorce process a great deal of financial information needs to be gathered and with Asset Planet we can do more with that information than a spreadsheet or other typical form used by Divorce lawyers. These busy professionals seldom want to use their own time or their internal team staff to sift through paperwork, organize and perform data entry. As an Asset Planet agent, you can solve a problem for them while also providing them with an additional revenue stream. Stronger relationship and more revenue while staying within their core skills. Potentially you might be a great source of referrals to them.

4. **Insurance Professional** – The Asset Planet Death Legacy Protector module is a direct tie-in for people who sell insurance solutions related to death. The deluxe version of the Asset Planet Inventory App is free for existing subscribers and a great way of helping to determine if clients are adequately insured based on their current value of items. Eventually Asset Planet will offer a full array of financial tools that can be applied to these professionals’ internal business practice and to their clientele.

5. **End of Life Planners** - The Asset Planet Death Legacy Protector module is a product directly intended for this group.

6. **Nurses, Dr’s and other Medical Professionals** – This group is a Center of Influence for many others and sometimes they are not the best at taking their own advice, with claims of being too busy. But once you get this group committed, they will often share with others their trusted opinion if based on a positive experience.

7. **Funeral Homes Mortuaries** - The Asset Planet Death Legacy Protector module is a product directly intended for this group.

8. **Charities, Churches and other Non-Profit Groups** - The Asset Planet Death Legacy Protector module is a product that can be used as a charity drive to raise money. (specialty pricing and interface from Asset Planet). Instead of selling things people often don’t need but they buy to support the charity, instead they can have something of deep value with reoccurring revenue

for the charity or non-profit groups. Thinking bigger can include Union Members and others who benefit from the scale of being a member of something else.

9. **Every individual you meet** - This is why we suggest every Sales agent carry an old fashioned business card with basic information and your discount code. Tell your story and your belief why there is value to subscribing to the Asset Planet – Death Legacy Protector.
10. **Financial Advisor (RIA, CPA, CFP, Broker Dealer, Business Managers, etc.)**
  - a. Why – Asset Planet software was designed by long-time financial advisors for solving complicated formulas but utilizing a linear interface that requires very little training or experience. No need for highly specialized skilled people for data entry or interpreting data results. We are extremely cost competitive, if not the lowest, when compared against other programs. Asset Planet also include many modules that are unique and or would cost extra in other competitors. We also have fully integrated App suite to help end user collaborate with professional.
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#### **Why did we choose this Business Model for sales?**

- Multi-level Marketing (MLM) was decided against because it typically involves a downline of others buying into your system. Often described as a pyramid with those at top getting the most by way of those at the bottom. Often there are high inventory or membership costs, both of which didn't appeal to Asset Planet founders and our core values. We closely looked at the business model of Stella and Dot and we found them to be unique in their approach for their addressable market and products they sold. We are not saying MLM is bad or evil only that this business model didn't appeal to the founder's goals and core values that they wanted for Asset Planet and our family of Agents.
- Franchise – was very appealing because we can control our brand, process and territory, and so much more. We decided against a Franchise model due to the high legal costs for us as founders plus the added start-up costs for each owner. We also looked at the commission split for many business
- Employee – This was very appealing because we can tell the employees, how to perform tasks, when to show-up, how much to charge and many more aspects of control. We decided against this model because we felt the opportunity would be greater if we allowed our Agents to have other full-time jobs if they wanted to pursue representing Asset Planet as an Agent they can do this part-time if they chose. There are high costs to have employees and high exposure of legal problems created by employees. We felt that our Agents can make a much higher revenue stream if their growth was based on the business they helped build. as Independent Contractors.