

EPT Affiliate Enrollment

Realtors: Interested Realtors will be enrolled by the sponsoring Trustee by entering the Realtors contact information in the myept.com website. ******(Realtors are the only professional group that is provided free access to the EPT tools and support, until they close their first transaction.)

Other Professionals: For other professional advisors who wish to become an EPT affiliate, we will have to direct them to enroll personally as follows:

- Go to www.myept.com and click JOIN NOW!
- Enter your profession and license information – click next
- Enter Partner Code: **RPtrustee**
- Complete your personal profile information & payment info
- Once submitted, the new member will receive a welcome email with a guide on how to use the website.

There is a \$50 set up fee and monthly membership fee of \$40 to be an affiliate member, and to receive access to all of the marketing and other support described below.

It is possible you will be sponsored by another EPT affiliate in Reef Point and Greg Reese's EPT network, and if so you will have both your sponsor's and Mr. Reese's individual support.

The rest of the on-boarding process outlined below will be the same.

Preview of the new Affiliate On-boarding Process.

- Once you are enrolled, the Estate Planning Team (EPT) has an amazing administrative staff who will create your new DST websites and email you with the URL, your login information and a tutorial of how to use the sites. The following information will be included in this initial email:
 - The first domain will be www.mydstplan.com/yourusername. This is your lead generation site. The site includes a compelling message and a call to action form where interested parties can tell you about their situation. Prospective clients may find your site through Google searches and you may use the URL in marketing and advertising to generate new leads. When a contact form has been completed, you will be notified automatically by email that you have a new lead, which will then appear in your second website as described below.



- The second domain you will receive is the cloud-based Client Management Tool. This domain will be www.myept.com/yourusername. This site serves as the client management portal. It provides you with: all client contact information; details of their proposed transaction; a DST illustration which compares and highlights the benefits of using the DST as opposed to selling outright and paying the taxes; a task manager; journal tab for notes; and a case management section to track the progress of a given case. This “portal” is shared with the other DST Professionals involved with you on each particular case, including the DST Tax Attorney, the Trustee, the Investment Advisor and the “Broker”- meaning the person who brought forward the case in the first place.
- **Approved Marketing Flyer Material.** The EPT has created several approved marketing flyers and brochures for use by our affiliates. EPT will customize our DST brochure with your contact information so that you may use it for marketing purposes or as a client handout. You will receive several possible marketing flyers (*also available to view on this site*) that are also available to use as mailers, email attachments or counter materials. I would suggest that you identify one or two of these flyers you would like to begin with, and email greg@reefpointUSA.com with your selections so that I may have these flyers customized with your contact information to be used in your marketing. We can always add more of these flyers later. We may ask you to email us your photo and perhaps a jpeg or pdf of your company logo to include in this personalization.
- **Required Initial Training (Free).**
 - Once your EPT websites have been created, you are invited to schedule your online DST training with our National Marketing Director, Michael McIntyre. Your EPT email will also include the following calendar link to register for a dedicated DST Training webinar, which are typically held at least once each week. <https://calendly.com/askmac>
This training is a live webinar lasting approximately 2 hours, which includes the training, a quiz, a review of each quiz answer and Q&A with Mr. McIntyre.
- **Optional Tuition Based Training from EPT.** During your DST Training Webinar, Mr. McIntyre will describe for you the additional training that is available to you from the EPT. Essentially this training is focused on expanding your network so that additional DST transactions can be fed to you from the network of other professionals you currently know and those that you will be able to approach because of the unique DST strategy you are able to help them offer to their own clients and prospects. Note that there is tuition for



this training. Without getting too deep into the details here, if you are able to reach out to professionals in complimentary specialties, be it Real Estate, Business Brokers, 1031 Accommodators, CPA's, Investment Advisors, Business, Tax, Estate Planning, or Family Law Attorneys, the DST can help you bring new clients to serve in your primary specialty.

- **Training and Support from your DST Trustee.** An essential component of your success will be having access to individual training and support from your DST Trustee. When it comes to support for individual prospects and possible transactions, your DST Trustee is your most valuable asset. You are a professional in your field. You are not expected to be the DST expert for your client. Instead, you are the client's primary advisor and are the quarterback that ensures the delivery of the related services needed to complete the PRIMARY transaction you were retained to deliver. To this end, the DST Trustee can provide to you the following additional services:
 - Consultation and analysis on a prospective DST Client
 - Conference call, video conference, Zoom, Skype, or in-person meetings with a client or prospective client.
 - Individualized webinar training
 - Workshops for your sales team
 - Workshops for your existing and potential clients
 - Marketing Strategy
 - Marketing Content
 - Sales Scripts
 - Powerpoint Presentations
 - Assistance in customizing your own explainer videos

