

Two Websites for Sale

One Acquisition Package

NationalWillKit.com + DigitalWealthMedia.com



Acquisition Proposal

Asset Package: DigitalWealthMedia.com + NationalWillKit.com

Opportunity Concept: Licenses for Financial Firms

Framework Benchmark: Raymond James Independent Contractor
Super-OSJ Network Model

Buyer Audience:

- Registered Investment Advisors (RIAs)
- Independent Broker-Dealers (IBDs)
- Super-OSJs, Multi-Family Offices
- FinTech Aggregators
- Insurance carrier network
- Managing General Agents

OVERVIEW

Financial service providers face a very expensive barrier to growth: extraordinarily high digital Customer Acquisition Costs (CAC). Acquiring a client for high-margin financial products—such as life insurance, wealth management, annuities, mutual funds or trust structuring—requires overcoming extreme consumer hesitation. Financial advisors are rarely sought out on a whim; engagement requires a major life-trigger event.

Licenseco (NWK + DWK) solves this core distribution challenge by coupling two pre-built, complementary digital platforms **National Will Kit** and **Digital Wealth Media** into a unified customer-acquisition pipeline.

Rather than paying exorbitant rates for cold financial leads, Licenseco captures consumers through an accessible, universally recognized necessity—estate planning—and channels those warm, high-intent leads directly into backend financial products.

The Core Problem vs. The Structural Solution

The Industry Challenge	The Licenseco Solution
High Digital CAC: Keywords for financial advisory and insurance carry some of the highest cost-per-click rates in search media.	Low-Cost Top-of-Funnel (NWK): Virtually every adult recognizes the need for a Will. NWK captures organic and low-cost traffic by solving an immediate, low-friction legal need.

The Industry Challenge	The Licenseco Solution
High Consumer Friction: Choosing a wealth advisor or buying financial protection requires deep trust that cold ads cannot quickly build.	Natural Trigger Event: Completing an estate plan inherently forces a consumer to audit their asset protection, creating immediate readiness for financial offers.
Unqualified Lead Data: Cold financial leads require extensive, expensive vetting before a broker can assess lifetime value.	Rich First-Party Data Capture: The NWK intake flow collects self-disclosed, actionable data—dependents, real estate, liquid assets, and age—giving DWM pre-qualified lead profiles.

SUMMARY

Large institutions like Raymond James (which leverages an internal branch network and Raymond James Trust across ~8,000+ financial advisors) build and protect these integrated systems internally because they understand the structural advantage: Estate planning is the ultimate wedge product to capture wealth management assets.

The Scarcity & Availability Premium

Large financial institutions spend tens of millions of dollars building proprietary digital lead channels or acquiring existing tech to secure their client pipelines.

- **Market Reality:** An independent buyer—such as a mid-sized RIA, an insurance IMO/FMO, or a private equity-backed wealth aggregator—cannot go out and buy an integrated estate-to-wealth engine off the shelf. No open market exists for pre-coupled, pre-compliant dual-entity funnels.

- **Otherwise**

1. 12–18 months of product design, user testing, and legal compliance integration.
2. \$300,000+ in agency/legal fees to architect cross-entity data sharing properly.
3. Opportunity cost and market delay while competitors capture market share.

Strategic Comparison:

Raymond James Model vs. Licenseco (NWK + DWM)

Comparing Licenseco to Raymond James demonstrates how this digital setup democratizes a model previously exclusive to Wall Street institutions.

Feature / Metric	Raymond James	Licenseco (NWK + DWM)
Footprint / Scale	~8,000+ advisors, ~3,000+ branch/office locations, heavy physical infrastructure.	100% Digital, nationwide reach with zero brick-and-mortar overhead.

Feature / Metric	Raymond James	Licenseco (NWK + DWM)
Estate Entry Point	Human advisors conducting estate reviews via Raymond James Trust.	High-scale, digital-first National Will Kit (automated self-service tripwire).
Lead Conversion Engine	In-person wealth management & trust officer hand-offs.	Digital/Automated Digital Wealth Media routing to high-margin financial products.
Capital Requirement	Multi-million dollar annual corporate overhead and branch maintenance.	Lean, high-margin, software-driven digital funnel.
Availability to Buyer	Proprietary & Closed: Completely locked inside the Raymond James enterprise.	Available Asset: Turn-key acquisition opportunity for an ambitious acquirer.
Price	N/A	\$350,000 USD

HOW IT WORKS

Consideration	Single Parent Company
Corporate Structure	Licenseco, a holding company owns 100% of both the regulated financial firm, DigitalWealthMedia.com and the estate planning firm NationalWillKit.com.
Legal Risk & Liability	Liability is ring-fenced between these entities. A legal dispute on the estate planning site of NationalWillKit.com will not expose the financial firm's assets, as corporate formalities are separated.
Regulatory & Licensing Compliance	The regulated entity retains sole and strict control over financial advice and customer data protection.
Brand & Funnel Synergy	Stronger. Allows seamless cross-promotion, shared back-office technology, and unified equity growth for the owners.

Why This Architecture is a Major Advantage for the Owner

When a strategic buyer evaluates these 2 sites they see 3 major advantages:

1. Unlocks High-Value Financial Leads at a Lower Customer Acquisition Cost

Generation of financial leads is one of the most expensive categories online. Bidding on keywords like "Life Insurance" or "Financial Advisor near me" on Google Ads can cost \$50 to \$150+ per single click.

2. Estate Planning Keywords: NationalWillKit captures users via estate-planning keywords, which are far cheaper and carry less ad competition. The user gets access to prime, high-intent financial leads at a fraction of standard acquisition costs.

3. The ability to create a franchise system with varying levels of service.

Key Investment Highlights for Owner

1. Unrivaled Recruiting Leverage: Solves the #1 reason advisors switch broker-dealers: client acquisition. Offering warm, qualified estate leads gives the buyer an insurmountable advantage over standard platforms that only offer back-office compliance.

2. Generational Wealth Lock: Capturing estate plans early gives the buyer visibility into beneficiaries and heirs, protecting the firm against asset flight during intergenerational transfers.

3. High Return on Capital: A single \$500,000 portfolio conversion generates ~\$5,000/year in recurring revenue. Converting just 2%–5% of estate leads yields tens of millions in new AUM.

4. Defensible Strategic Moat: Combining both the brand media engine (NationalWillKit.com) and the functional utility asset (DigitalWealthMedia.com) creates an organic client pipeline that competitors cannot easily duplicate.

Expansion Strategies for the Owner

A buyer acquiring this asset package can scale across state lines using three distinct operational models:

A. The Super-OSJ / Corporate RIA Model (Raymond James Benchmark)

The buyer acts as the central platform provider, recruiting independent financial advisors across multiple states as Investment Advisor Representatives (IARs).

- **The Pitch to Recruit Advisors:** Advisors join the buyer's network because the buyer provides exclusive territorial access to pre-qualified leads from NationalWillKit.com and content on DigitalWealthMedia.com.
- **Head Office Monetization:** The buyer retains a 20%–30% payout split on all AUM generated through the platform.

B. CPA & Legal Practice Joint Ventures

Accounting and estate law practices hold deep client trust but lack recurring AUM revenue. The buyer forms localized Joint Ventures, providing the digital platform and licensed advisory infrastructure to split wealth management fees generated from the law/CPA firm's existing client base.

C. Strategic Solicitor / Referral Network

For buyers seeking a low-liability model without multi-state compliance oversight, the platform operates as a media and lead-generation utility.

Conclusion

This acquisition grants the buyer full ownership of two complementary, fully developed web properties: **Nationalwillkit** (top-of-funnel estate planning intake) and **Digitalwealthmedia** (downstream wealth protection and financial advisory).

Rather than purchasing historical cash flow, an acquirer is buying a **complete, ready-to-launch 50-state licensing engine**. Building a custom dual-site platform with automated IP-geofencing, custom lead routing, state sub-domains, and legal term frameworks typically requires 6 to 9 months of engineering and \$70,000+ in agency development costs.

Acquiring this turnkey package allows **Licenseco** to bypass development delays and immediately begin selling exclusive state usage rights to financial advisory firms, law groups, or insurance agencies in all 50 US states.

Cost-to-Crete (Build vs. Buy) Value Realization

Platform Development Component	Estimated Agency Cost / Time	Included in Package
Dual Brand & Domain Portfolio Acquisition	\$5,000 – \$10,000	YES (100% Complete)
Web App Development & Form UI/UX Design	\$25,000 – \$40,000	YES (100% Complete)
50-State Automated IP-Geofencing & Sub-Domains	\$15,000 – \$25,000	YES (100% Complete)
Legal Framework, Term Sheets & Pricing Matrices	\$10,000 – \$15,000	YES (100% Complete)
Development Timeline	6 to 9 Months	0 Days (Ready to Launch)

Reason for Sale

These two web properties were built on the foundation of 24 years of direct industry experience running LIFEANNUITIES.com (founded in 1997 and successfully sold in 2021). Over more than two decades working directly with everyday families, we learned precisely what people need to secure their income, protect their estates, and build lasting financial security.

Following the sale of our previous company, we dedicated ourselves to translating those decades of domain knowledge, customer insights, and financial problem-solving into Nationalwillkit.com and Digitalwealthmedia.com.

The technical build, intake architecture, and 50-state licensing frameworks are now 100% complete. However, due to a sudden health event, we are unable to lead the national marketing rollout. We are seeking a clean, straightforward transaction with a buyer or master acquirer who can take this completed platform forward.