The
ESTATE CHECKUP™

Your guide for cultivating tip-top

ESTATE ATTORNEY ALLIANCES

A marketing campaign for financial advisors

What if you had a **process** to collaborate with estate attorneys and specific reasons for them to **refer high value clients**?

If you want to develop ongoing alliances with attorneys to grow your client base, take a good look at The Estate Checkup™ campaign.

Every opportunity to interact with and support an estate attorney on a client issue represents an opportunity to increase your credibility and referability for attorneys and clients alike. This program is designed to help financial advisors understand the two impediments of gaining referrals from estate attorneys and the seven points of collaboration which create a substantial value proposition to work together at a whole new level.

The Estate Checkup™ campaign kit will provide you with both the step-by-step process and the tools you'll need to develop these new relationships and transform them into long-term, lucrative alliances.

Our 7-Point Program will help prepare you for almost every possibility:

1. ATTORNEY-ADVISOR-CLIENT MEETINGS
2. SPEAKING ENGAGEMENTS
3. ESTATE SETTLEMENT ASSISTANCE
4. THE IN-SERVICE LEDGER REVIEW
5. THE TRUST FUNDING REVIEW
6. FAMILY MEETINGS
7. COLLABORATING WITH NON-PROFITS

THE GOAL:

A few solid relationships with estate attorneys in which you refer clients to one another often and collaborate on your clients' behalf to provide seamless service and quality, cohesive advice.

THE CHALLENGE:

Attorneys typically don't reciprocate on giving referrals.
One common hindrance to developing strategic alliances with estate attorneys is risk of the referral not going well and/or potential to destroy the relationship with the source of the referral to them originally. Another is that attorneys are often asked by financial advisors for referrals. There needs to be a clear way to avoid the potential for conflict with privacy and confidentiality.

THE SOLUTION:

THE ESTATE CHECKUP™ – Collaborative estate planning for financial advisors and estate attorneys.

Why does this work? This campaign provides a step-by-step guide and process along with scripts, templates, personalized marketing materials and more to help you provide genuine value to attorneys' estate planning practices.

By mastering this campaign, you will:
- Demonstrate your credibility
- Delight and develop loyal clients
- Gain word-of-mouth referrals
- Differentiate yourself from your competitors

Here are some of the tools you'll find included in The Estate Checkup™ campaign kit:

1.Campaign Guide

2.Meeting the Attorney

- Phone Script for Initial Call to Attorney
- Attorney Introduction Letter Template
- Email Script to Follow-Up with Attorneys
- Program Overview for Attorney
- (History & Development, 7-Point Program Outline, Roles Defined, and Sample Confidentiality Agreement)
- Attorney Meeting Agenda
- Action Plan
- Attorney Kit Letter Template

3.Collaborative Team Meetings

- Script to Schedule Meetings
- Sample Collaborative Team Meeting Agendas
- Sample Estate Planning Action Plan
- Sample Estate Illustration with Alternatives

4.Presentations

- The Estate Checkup™ PowerPoint
- Presentation Template & Script
- Speaking Engagement Checklist
- Presentation Comment Card
- Client's Attorney & CPA List Excel Template

5. Estate Settlement Support

- Service Description for Attorneys
- Sample Job Description – (Successor) Trustee

6.The In-Service Ledger Review

- ILIT Review Letter Template & Response Card (Attorney Letter to Client)
- How to Set Up & Hold ILIT Client Meetings

7.Trust Funding Review

- Trust Funding & Client Review Process
- Letter Template & Phone Scripts to Schedule & Confirm Client Reviews
- Will/Trust Intake Form & Beneficiary Audit Form
- Trust Funding Flow Chart
- Letter Templates to Follow Up

8.Family Meetings

- The Comprehensive Guide to Hosting Effective Family Meetings
- Family Meeting Planning Worksheet
- Sample Menu of Service Addition
- Family Meeting Event Checklist
- Sample Family Meeting Agendas

9. Non-Profit Collaboration

- White Paper: The Why & How of Collaborating with Non-Profits
- Scripts & Ideas for Addressing Specific Collaboration Roadblocks
- How to Speak at Non-Profit Events
- How to Become a Thought Leader in the Non-Profit Community

10. Customized Marketing Materials

- 5 Things Flyer (Display for Attorney's Office)
- Estate Plan Organizer
- Estate Settlement Assistance Flyer
- Trust Funding Flyer

**Marketing materials will be customized with your firm's information by our professional graphic designer. Client facing materials will need to be approved by your compliance department*

WiseBranch

Start growing your client base through estate attorney alliances. Learn more by calling Kristine Hartland, CFP, CFS, CEBS, EA at 727-421-9512 or email at kristine.k.hartland@ampf.com