

## How to Establish Yourself as An Expert and Leader In This Time of Crisis Without Seeming Opportunistic

Learn how you can use social media to get into the conversation and begin establishing yourself as an expert in the community, as a lawyer and a leader ready to serve.

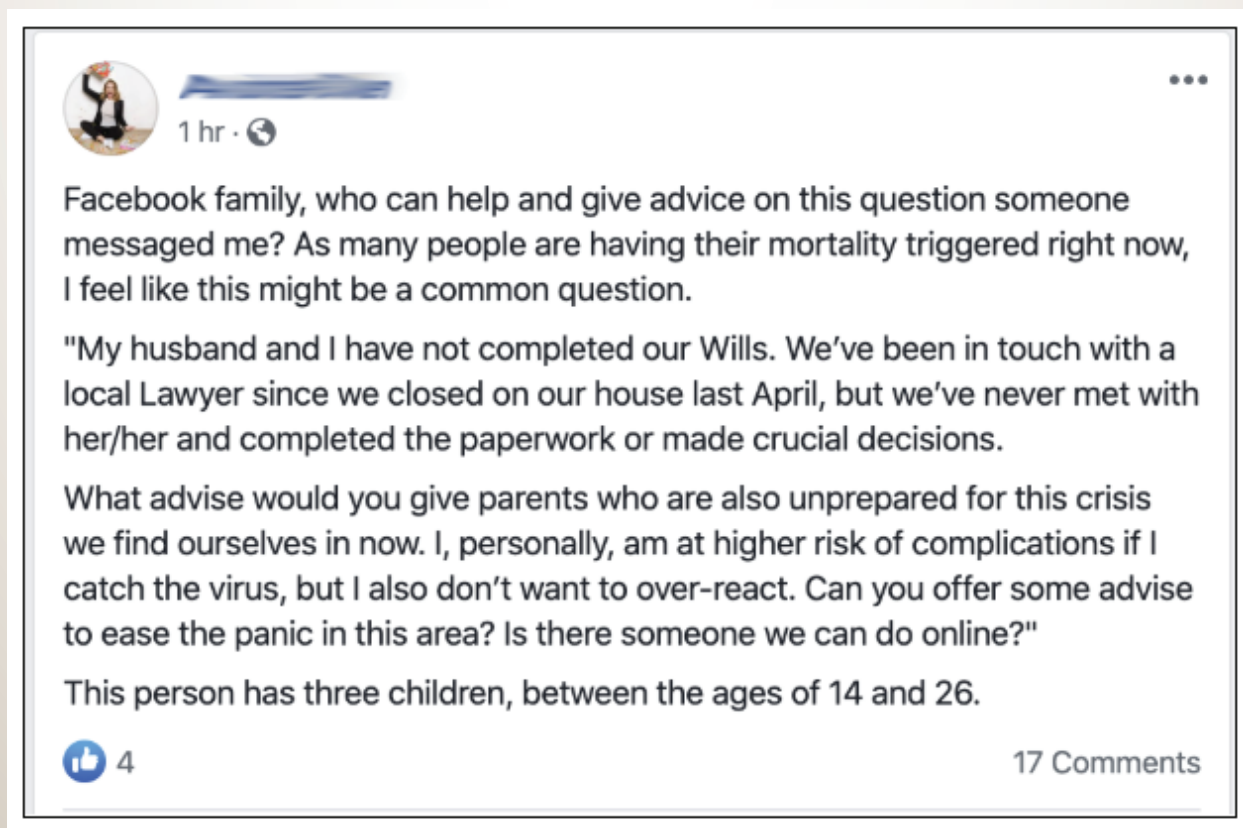
# How to Establish Yourself as An Expert and Leader In This Time of Crisis Without Seeming Opportunistic

Now is the time for you to step up and lead as a servant leader in your community.

If you are worrying that communicating about estate planning at this time will seem opportunistic, get that thought out of your head and realize that if that's what you are thinking, you are coming from the wrong place.

**The place to come from at this time is to recognize that your community needs you.** They are already thinking about estate planning, as they face their own mortality and that of their parents. The tremendous opportunity for you here does not negate that you are able to serve, and make money, and frankly, keep the economy moving. We need people who can serve and earn money — like you — to do just that, now more than ever!

## See for Example



Your job now is to get into the conversation, using your social media channels, and establish yourself as an expert who can help with these matters, virtually.

If you have not already watched our training on how to go virtual now, watch it here if you are interested in joining membership or watch it here if you are already a member. And, here is a more concise guide for everyone.

We will help you. Your job is to set up your intake process to be prepared to host only as many Family Wealth Planning Sessions (FWPS) as you have time to actually host and serve only as many clients as you can serve. So get clear on your capacity to serve, block your calendar as we teach, and then set up your online scheduling for the FWPS and plan to host them via Zoom. Do not host more FWPS than you can actually deliver on, understanding your own internal team capacity. This is very important.

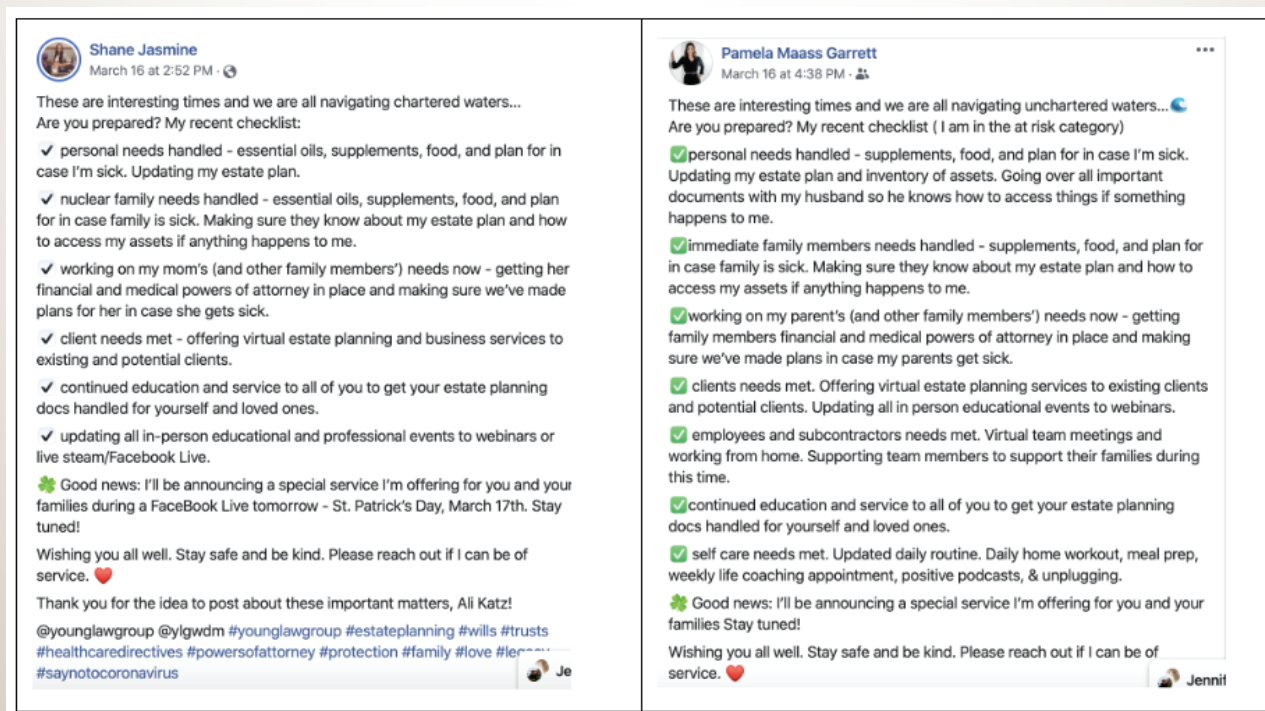
To begin establishing yourself as an expert in the community, and a leader ready to serve, consider making social media posts as I have, first establishing you as the expert, and then asking for permission to offer even more. See the way I've done that below. And, how Pam and Shane have modeled it.

While my favorite platform is Facebook, you can do this on Facebook, LinkedIn, Instagram, or in local community groups, including Nextdoor.com. You'll see how I'm sharing my own process, posting from a place of service, and then steadily asking for permission to share more.

# What I've Posted so Far on Facebook...



Pam Maas saw what I did and created her version. Then, Shane Young modeled it. You can see their versions here, or on their FB pages or in our NLBM Member Social Media Support Group.



## Next, I posted this:



**Ali Katz**

March 15 at 11:28 AM · 🌐 ▼

After posting about talking with my mom about her health care directive + updating the map of her assets, where they are, and how my sister and I will find her accounts and such if something happens to her, I was asked how to speak with parents who are very resistant to making these plans, or being helped to make these plans?

I will be providing a more formal webinar on the one action we can all take in this area now, as we settle into our homes in the coming week.

For now, please do start to discuss with your parents, even if they are resistant. Let your parents know that you are scared that if something happens to them, you will not know what to do unless you get into conversation about it.

Notice how I suggested you communicate here — it's not about telling your parents what to do, or demanding anything from them, but instead about getting vulnerable with them to let them know that you are scared that if something happens to them, you will not know what to do.

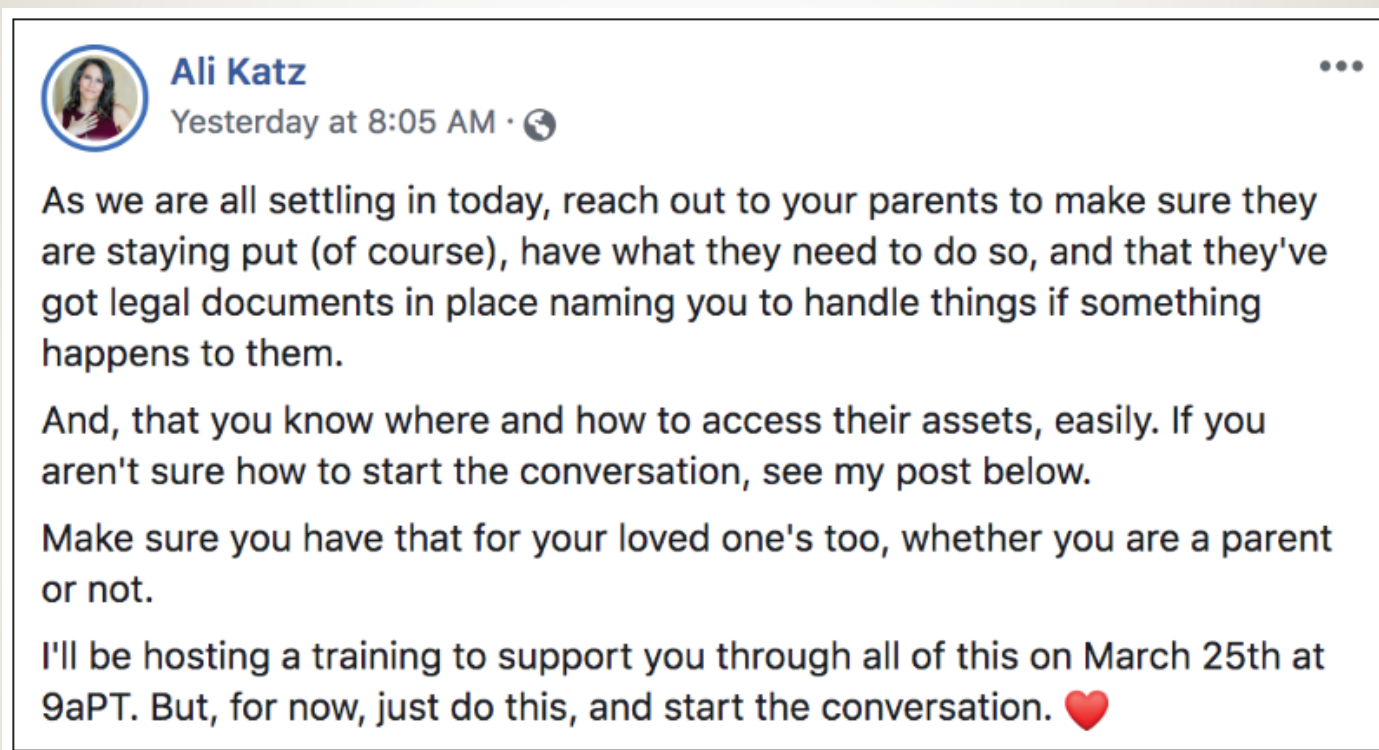
If you are willing to be honestly and confidently vulnerable (thank you [J Mathias Bennett](#)), it's your best chance for your parents to meet your desire, and to break through any resistance they may have.

If you have specific examples of resistance that I can speak to directly with your response in the face of their resistance, please post your example here and I will write additional posts addressing specific examples.

Please do share this with anyone who may need support talking with their parents. And let them know they can follow me for continuing support in this area, and on the question of how we, too, can prepare our own assets for whatever comes down the pike.

By posting that, I began to let people know I would be providing a webinar, coming soon.


Next, I shared the date of the webinar. Please note the date has changed to give us a bit more time to prepare, and we will be sharing with you how you can share this webinar with your community very soon. I'll be promoting YOUR services on that webinar. All you have to do to be ready is to have your virtual scheduling and intake setup, and then send your people to it.



Remember that most people are still just getting their families situated, and now is your time to establish yourself as the expert/leader, let them know you are thinking about them, and that you'll be sharing more details as soon as you can about how you can help. The point here is for you to start the conversation, now, from your own personal process, as I did, and Shane and Pam have as well.

We are all going through this experience together, and your community wants to hear from you about how you are handling it. That's how you begin to establish yourself as a leader. Your ability to share your own personal experience, with vulnerability, and openness, connects you to your community.

Finally, I shared this to begin to identify who in my community wants to hear from me on legal and financial topics. And, this post got the most traction yet.



**Ali Katz**  
Yesterday at 10:31 AM · 🌐 ▼


I have a lot of important information to share regarding personal financial and legal management in these times, for us and our parents.

It does not seem like my posts are getting seen, and I'll buy ad space, if necessary.

But, also wondering if my posts are getting seen and people are too focused on medically related stuff to think about financial/legal. Or, if there is a better way for me to be sharing what I have here. I know many of you are better marketers than me, so if I should be sharing differently, please LMK that as well.

If you see this and want financial/legal info for yourself/your parents, please comment here so I know it's wanted and so other people see it too.

Thanks!

  Jennifer Peck, Ariel RK and 87 others

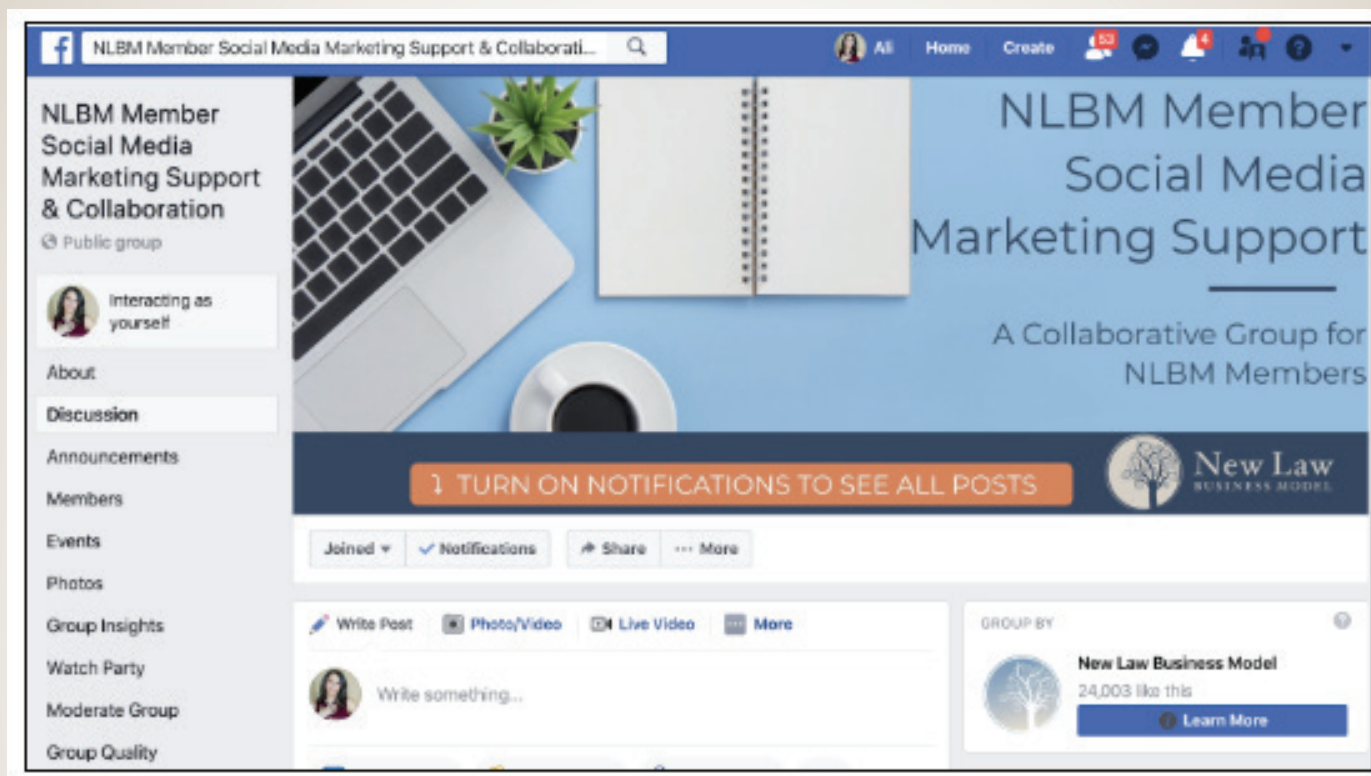
59 Comments

Finally, I will be reaching out to all of the big name, online influencers I know, asking them to share an article I am writing (we'll have one ready for you with your weekly articles this week), which will lead to the webinar I am hosting.

You may not know big name, online influencers, but you do know influencers in your community. Bloggers, and financial advisors, and insurance professionals, and other business owners who are all in the same boat as you are, and who are waiting to see who is going to step up and lead. Let it be you!

The other business owners in your community are looking for valuable content to share with their clients and customers, and you have the opportunity to become THE resource on family financial and legal planning, right now. So, use the resource we are giving you, and run with it!

In the meantime, you may want to see what some of our other member lawyers are doing in their social media. If that's the case, and you are a member, be sure you have joined the NLBM Social Media Marketing Support Group on Facebook. You can join here.



Whatever you do, do not get overwhelmed by panic or fear or worry that you do not have what you need. And if you notice that you are getting overwhelmed by panic or fear or worry, you've done the first step simply by noticing that. Then, take the next indicated step and get on a coaching call with me, talk with your coach, or post in the forum (or whatever else works for you) so you can welcome the fear, let it move through you, and do the work to come out the other side clear and ready to serve.

You have everything you need to take just your next steps. Just stay focused on where you want to go (becoming a leader in your community) and the exact next steps to get there. We are here to support you 100%.



If all you can do is promote the webinar I am hosting on March 27th to your community, that is enough. We will provide you with everything you need for that.

And, in the meantime, you can get your online intake (scheduling and pre-meeting homework) set up. Remember, in reality, you can only do FWPS and planning for probably between 4 and 15 people in a month, depending on your existing team capacity, so you are not trying to reach and serve everyone. You are really only needing to reach and serve the select few who really care about this and you have the capacity to help.

So focus on serving! Begin communicating with your “audience” — people in your community — via email, LinkedIn, Facebook and Instagram, not frantically, but intentionally from a place of service, and let them know you are getting geared up to serve them virtually. Open the conversation, as I did above, with examples you can model.

And, as soon as we have the link to get you signed up for the webinar I am hosting, which you can share with your community, and which will promote your services as a Personal Family Lawyer, we’ll get that to you, along with the promotional copy.

To a life and law practice you love,

Ali