



# THE GREATEST ONLINE SUMMIT EVER FOR ESTATE PLANNING PROS

(AND THOSE WHO WANT TO BE)

## WORKBOOK

**PRESENTED BY** New Law Business Model

**HOSTED BY** Ali Katz



# SESSION #1: WELCOME SESSION FOR EP SUMMIT

Heart centered leadership is using your \_\_\_\_\_ in the highest and best way possible.



Why does Ali believe it's so important to have heart-centered leadership?

Every adult human that you know needs an: \_\_\_\_\_

When people make their decisions through a lens of \_\_\_\_\_, instead of short-term gratification, they begin to make their investment choices differently.

What's true for you in your practice right now?

What are you most looking forward to for the Summit?

## SESSION #2: HOW TO BE THE SMARTEST + MOST APPROACHABLE LAWYER IN THE ROOM THAT EVERY CLIENT WANTS TO HIRE & EVERY REFERRAL SOURCE WANTS TO WORK WITH

Wherever you are is the perfect place to be.

It keeps us living longer, feeling healthier,  
loving our lives when we're willing to keep

\_\_\_\_\_.



with Jim Carlisle

What was Jim's method of making connections during networking events?

Know \_\_\_\_ and \_\_\_\_\_ your clients are.

One of the biggest impact decisions Ali made in her own law practice  
in the early years was that she chose to focus on serving families with

\_\_\_\_\_.

When you choose a \_\_\_\_\_, everybody else comes to you.

What kinds of questions does Jim say gets you into your clients' innermost thoughts?

Jim believes that being in a position of a \_\_\_\_\_ is the best position to  
be in.

## SESSION #2: HOW TO BE THE SMARTEST + MOST APPROACHABLE LAWYER IN THE ROOM THAT EVERY CLIENT WANTS TO HIRE & EVERY REFERRAL SOURCE WANTS TO WORK WITH (CONT'D)

“

*Your confidence comes from the fact that you have a relationship with the client and you're going to help them to make the right decisions for the people that they love.*

Most lawyers miss important opportunities to make networking connections because they don't have \_\_\_\_\_.



with Jim Carlisle

What are your prospective clients reading?

Advice from Ali & Jim: Go to five people that you serve, or to a Facebook group that you're in with your prospective clients or a LinkedIn group, and just ask the question, what do you read for fun? Staying in touch with the latest news helps you be the smartest lawyer in the room.

If you know how to \_\_\_\_\_, then you can serve the people in your community.

A \_\_\_\_\_ plan makes sure that when death happens, your family knows how to find what you have, where it is, and how they keep it out of the court process.

The right partner will let you shine because they're more interested in the \_\_\_\_\_ relationship with you than they are the short-term one-off relationship with your client.



## SESSION #3: WHY YOU MUST HANDLE POST-DEATH ADMIN AND HOW TO DO IT WITH EASE, GRACE AND SUPPORT

Leah felt like there was no true north for \_\_\_\_\_ administration.

Some lawyers choose to not handle post-death matters and \_\_\_\_\_ them out.



with Tara Faquir



and Leah Del Percio

What is the goal of a systematized estate administration process?

An executor can find value in a lawyer hired for estate administration by utilizing them for \_\_\_\_\_.

Describe the distinguishing elements between a state administration and a state settlement:

What is the benefit of the estate administration dashboard for clients and family members?

The program automates over \_\_\_\_% of the estate administration tasks so that lawyers can do things in an effective and correct manner to get it done quickly.

The asset and liability search is part of the estate administration process and is used to figure out what the decedent \_\_\_\_\_ and owes.

## SESSION #3: WHY YOU MUST HANDLE POST-DEATH ADMIN AND HOW TO DO IT WITH EASE, GRACE AND SUPPORT (CONT'D)

The software tool will execute on tasks but is not replacing the lawyer's \_\_\_\_\_ and what clients pay for.



with Tara Faquir



and Leah Del Percio

The goal of the technology is to not only alleviate the attorney's workload, but to alleviate that of the \_\_\_\_\_ and to make sure it's done in a correct fashion.

“

*The fact is, after somebody dies, their loved ones don't want to be spending the time to do this. They really just want you to handle it, and they are so happy to pay you out of the estate to be able to handle it.*

The software is here to be a tool for you to use to help you provide adequate \_\_\_\_\_ to your clients.

“

*You're able to use your expertise and combine it with our technology to make for a really wonderful client experience.*



# SESSION #4: TRUST FUNDING OPTIONS TO ENSURE YOUR CLIENTS' PLANS WORK + YOU GET PAID FOR IT + YOU GET IT DONE!

A lot of times our clients don't know what \_\_\_\_\_ is.

If you aren't \_\_\_\_\_ enough, you're not actually serving your clients and you aren't able to build a business.



with Mike Rutkowski

What is the Funding Accountability Process?

Ali hired a \_\_\_\_\_ coordinator and created a pricing model where the funding accountability process was built into every plan.

The funding accountability process is a critical step in estate planning and helps to ensure that the client's \_\_\_\_\_ are owned in the right way.

Make sure that people know your \_\_\_\_\_, especially if they've become your client.

What is funding debt?



*How many of you might be sitting out there right now with funding debt and don't know what to do?*

There is approximately \_\_\_\_\_ in the Departments of Unclaimed Property across the US.

## SESSION #4: TRUST FUNDING OPTIONS TO ENSURE YOUR CLIENTS' PLANS WORK + YOU GET PAID FOR IT + YOU GET IT DONE! (CONT'D)

One of the very first things that you do after the client engages you is to create an inventory of the \_\_\_\_\_ and indicate who's handling the \_\_\_\_\_ and what is the action needed? And then what's the status?

Ali always recommends that the attorney handle all the \_\_\_\_\_.



with Mike Rutkowski

How often should you review the funding sheet with your clients?

\_\_\_\_\_

The funding process acts as a \_\_\_\_\_ for the lawyer.

How does the trust funding service help law firm owners show the value of funding to clients?

\_\_\_\_\_

Clients who had not properly funded their estate plans resulted in \_\_\_\_\_ battles and issues with their ex-spouses.

It's important to implement a \_\_\_\_\_ accountability process and \_\_\_\_\_ model in your practice, which includes hiring a funding coordinator and charging for funding services.

It actually takes more time to do the \_\_\_\_\_ than it does from intake to the signing of the plan.

What is the strategy for funding irrevocable trusts for tax planning?

\_\_\_\_\_



## SESSION #5: HOW TO GET YOUR DOCUMENT DRAFTING HANDLED WITH EASE SO YOU CAN EXPAND CAPACITY AND SERVE MORE CLIENTS

“

*One of the greatest gifts of this practice area is that I get to continue to learn how to feel more, how to be more with people, in ways that, for me, make my life worth living.*



with Laney Lyons

When people are calling you to talk about their will or their trust, the first thing they might be saying to you is:

\_\_\_\_\_?

If you are building your law practice into a business, you want to start thinking about all the things that you can \_\_\_\_\_.

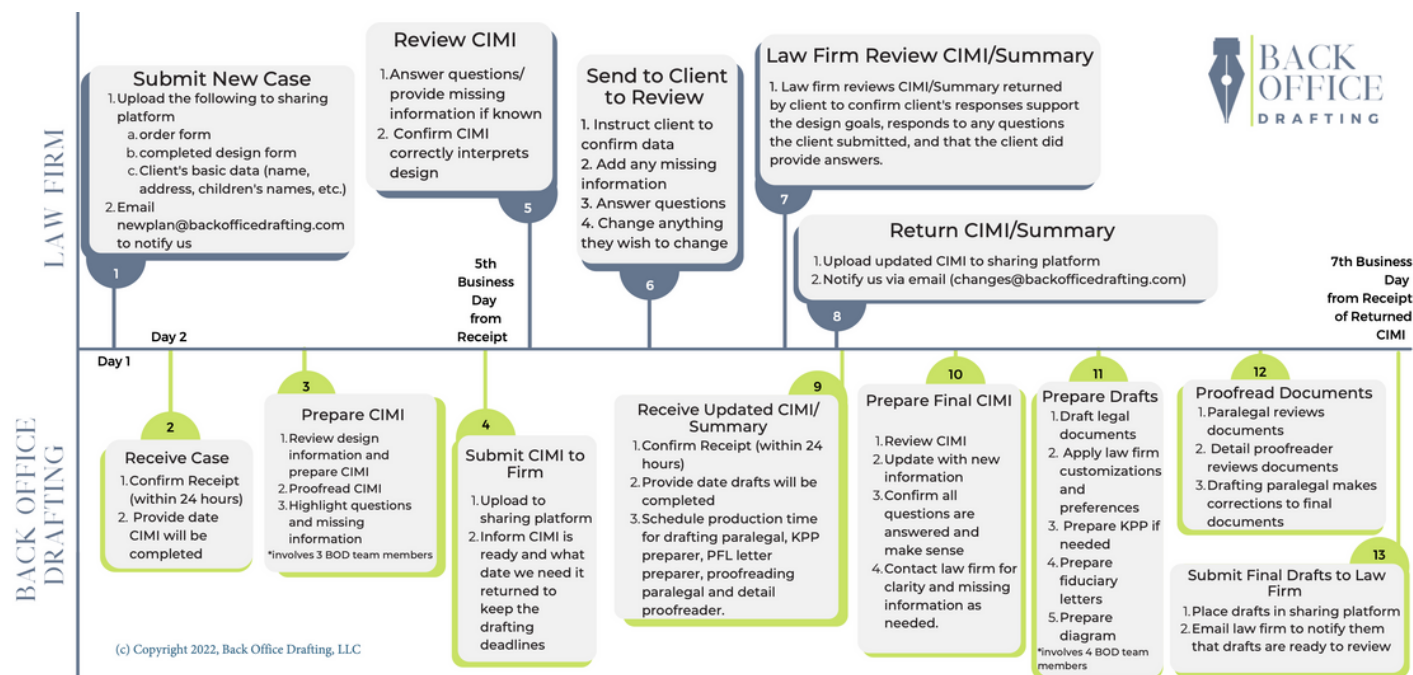
Only you can set the \_\_\_\_\_ and \_\_\_\_\_ of your business.

“

*You can't do all of it and do it all well.*

Journal Prompt: If you had to choose, what do you want to do in your business until the day you die or until you sell the business? What's the part that you love to do the most?

# SESSION #6: DOCUMENT DRAFTING SOFTWARE OPTIONS -- WHY TO USE AND HOW TO CHOOSE



1. Your clients engage your services and at the end of your engagement, you have a client services director that comes in and completes the engagement.
2. The client services director gets everything that's necessary such as payment reviews, engagement letter schedules, the next meeting, their signing meeting, or it could be their estate plan review meeting, etc
3. The client services director then immediately scans in a design sheet, all the notes that you took, any statements and everything that they brought with them are sent to you, puts that into your system and then sends that out to your in-house or outsource drafting solution.
4. Within 7-10 days, a CIMI (Confirmation of Important and Missing Information) is created and sent to the client. They also receive a Family Wealth Inventory (a summary of their assets)
5. The client services director reaches out to the client to ensure receipt and answer any questions.

It is critically important that you have a \_\_\_\_\_ for what to do when a client engages you.

Your \_\_\_\_\_ is provided because you have a \_\_\_\_\_.

## SESSION #6: DOCUMENT DRAFTING SOFTWARE OPTIONS -- WHY TO USE AND HOW TO CHOOSE (CONT'D)

Having a structured, scripted meeting can help ensure that the meeting has a \_\_\_\_\_ and that the lawyer is prepared to \_\_\_\_\_ the plan.

Lawyers should have an "attorney meeting folder" on hand, which can include an \_\_\_\_\_ letter that can be filled in and signed on the spot, a \_\_\_\_\_ sheet to go through to design the plan, and a separate sheet for notes on things outside of the \_\_\_\_\_ sheet.



with Laney Lyons



*A good system gives the client so much more confidence and engagement with you that by the time you get to your signing, it's smooth.*

Laney's two types of proofreading: \_\_\_\_\_ and \_\_\_\_\_

\_\_\_\_\_ proofreading is done by experienced \_\_\_\_\_ who did not draft the plan, looking for key concepts, legal and technical accuracy and consistency.

\_\_\_\_\_ proofreading is done by proofreaders who check names, dates, and addresses.

To choose \_\_\_\_\_ software, first get educated on estate planning.

A minimum of \_\_\_\_\_ software options should be considered.

Estate planning can be less overwhelming by breaking it down into three categories:

- 1: \_\_\_\_\_
- 2: \_\_\_\_\_
- 3: \_\_\_\_\_

*Main Takeaway: Outsource your drafting and use a document drafting software.*

## SESSION #7: SOFTWARE SOLUTIONS FOR PERSONALIZED + AUTOMATED MARKETING, ENGAGEMENT AND SERVICE (USE TECH LIKE A PRO BUT STAY WARM-HEARTED WHILE YOU DO IT)



*Estate planning is not just a “one and done” thing. Not if you're going to do it in a way that differentiates you from the robots and differentiates you from the \$1,500 estate plans that are out there. It's just not “one and done”. It is you providing a lifetime of care, a lifetime of relationship to the people that you're serving.*



with Bonnie Faucett

What is lead generation?

Where are the two areas where most lawyers fail when it comes to lead generation?

1:

2:

Lead generation for lawyers can take many forms, including website \_\_\_\_\_ and \_\_\_\_\_ pages, live events and \_\_\_\_\_, and always-on webinars.

Stay in touch with these potential clients through \_\_\_\_\_, as it allows for consistency and timeliness in communication.

**Journal Prompt:** What are some lead gen ideas that could work for your practice?

One in \_\_\_\_\_ people that you interact with are ready to hire you today.

You can 7x your lead generation effort over a two year period if you simply \_\_\_\_\_ like you should.

## SESSION #7: SOFTWARE SOLUTIONS FOR PERSONALIZED + AUTOMATED MARKETING, ENGAGEMENT AND SERVICE (USE TECH LIKE A PRO BUT STAY WARM-HEARTED WHILE YOU DO IT) (CONT'D)

How does Bonnie automate the process of scheduling?

“

*When you automate and it's personalized automation, they're like, 'whoa, this lawyer's really on top of it.' And it creates trust.*



with Bonnie Faucett

The potential problems with not using a document portal for sharing design notes include:

1:

2:

3:

The biggest risk to your clients is that they don't \_\_\_\_\_ the plan.

Journal Prompt: What's your tech stack?

A low cost, low feature way would simply be MailChimp for your \_\_\_\_\_  
Calendly for your \_\_\_\_\_, Cleo for your practice \_\_\_\_\_.

There's a whole new player in the automation field: the role of intake of \_\_\_\_\_.

Legacy Architects aims to streamline the \_\_\_\_\_ and \_\_\_\_\_  
process for personal family lawyers.



## SESSION #8: HOW TO HIRE AND LEAD A TEAM SO YOU GET BACK YOUR LIFE

How do you serve your clients in a truly meaningful way so that you cannot be replaced by \_\_\_\_\_, so that you cannot be replaced by \_\_\_\_\_ legal document services or the \$1,500 estate plan on which a lawyer cannot build a business?



with Molly McGrath

Lawyers really get stuck on this piece of hiring and leading a team, because it requires \_\_\_\_\_ that as lawyers don't necessarily come naturally to us.

When asked about how they wanted to be rewarded, the majority of boot camp participants said they wanted more \_\_\_\_\_ not raises, bonuses or partnership track.

Feeling like no one has their \_\_\_\_\_ is the biggest struggle for law firm owners.

The \_\_\_\_\_ is the most critical position in a law firm.

\_\_\_\_\_ % of a law practice can be run by a non-attorney.



*Having a team allows you to be fully, wholly present with your clients. It allows for you to become such a magnificent attorney.*

If you are feeling frustration and resentment, where are you \_\_\_\_\_ yourself?

If you are trying to do this alone, and you are resenting it, chances are you don't have \_\_\_\_\_ and soul to begin with in your practice.



## SESSION #8: HOW TO HIRE AND LEAD A TEAM SO YOU GET BACK YOUR LIFE (CONT'D)

If you're serving more than \_\_\_\_\_ new clients a month, you've got to have the support.

If you're hiring a client service director, the average cost is about \$\_\_\_\_\_ a year.



with Molly McGrath

The average client service coordinator brings in an extra \$\_\_\_\_\_ a month for the firm.



*You did not go to law school to manage details. You went to law school to make a difference. To make an impact. You went to law school to serve. You went to law school to help people.*

## SESSION #9: HOW DENISE MAKES \$600K/YEAR IN JUST 10 HOURS/WK OF CLIENT SERVICE (NOT A TYPO) + HOW A.J. IS ON THE PATH TO MILLIONS WITH ESTATE PLANNING FOR BUSINESS OWNERS

Factors that hold lawyers back:

1. \_\_\_\_\_ billing
2. Playing too \_\_\_\_\_.



“

*It is the moment of struggle that is the moment of greatest opportunity. “I can’t do it” becomes “I have to do it.” Life is giving you a test. And it’s your opportunity to pass that test.*

Many lawyers are afraid to \_\_\_\_\_ down.

Journal Prompt: Take time to consider what your client avatar is.

How did Denise get into the room with VIP business leaders?

How can you approach clients with a \_\_\_\_\_ perspective?

Don't use this strategy until you know how to \_\_\_\_\_ clients.



## SESSION #9: HOW DENISE MAKES \$600K/YEAR IN JUST 10 HOURS/WK OF CLIENT SERVICE (NOT A TYPO) + HOW A.J. IS ON THE PATH TO MILLIONS WITH ESTATE PLANNING FOR BUSINESS OWNERS (CONT'D)

If you lead from a \_\_\_\_\_ heart, they won't take advantage of you. They will want to \_\_\_\_\_.

Denise had to shift from the deliverables to the \_\_\_\_\_ she brings.

\_\_\_\_\_ are key.

Typically \_\_\_\_\_ net worth people don't have someone to coordinate their various services. They lose more than the \_\_\_\_\_ when they make bad tax decisions or get the wrong insurance because there's no coordination or tracking.

“

*Money spent on the brain is never in vain.*

Only \_\_\_\_\_% of US business owners have a written succession plan.





## SESSION #10: PAID ADS THAT DON'T BREAK THE BANK - HOW TO MAKE PAID MARKETING WORK FOR YOU

When you have the \_\_\_\_\_  
in place to have a business so that paid  
marketing will work, it can work.

You have to have the fundamentals in place:



with Dax Hamman



and Sarah Lockwood

1. An intake and engagement system that allows you to engage at least \_\_\_\_\_% of the people you meet with.
2. At a minimum fee of \$\_\_\_\_\_

Any \_\_\_\_\_ you write over your career will pay dividends.

When you are ready to get \_\_\_\_\_ content it is for two other purposes:

1. To go into your \_\_\_\_\_
2. For posts on \_\_\_\_\_ where you give a little content

Both drive back to your \_\_\_\_\_.

So many lawyers want just one thing to work. But we need to \_\_\_\_\_.

When does Seth recommend layering in SEO?

## SESSION #10: PAID ADS THAT DON'T BREAK THE BANK - HOW TO MAKE PAID MARKETING WORK FOR YOU (CONT'D)

There is an art to Google – so be sure you follow these guidelines:

1. You can't use a \_\_\_\_\_ office unless you're leasing – have pictures.
2. Don't anger them with something that's \_\_\_\_\_.
3. Don't do something \_\_\_\_\_.



with Dax Hamman



and Sarah Lockwood

Get Seth's Virtual Office Checklist [here](#).

Most attorneys start with Facebook and Instagram ads, both under \_\_\_\_\_.

\_\_\_\_\_ ads are designed to find hand raisers who are ready to take some action.

Before you even start thinking about ads or budget – make sure you understand a few parts of the numbers of your \_\_\_\_\_.

Adding value on a landing page is clearly communicating what they will \_\_\_\_\_.

You're generating a \_\_\_\_\_ of an interested person who, if you show up consistently in their social media and articles and newsletter and nurture sequence, they will buy eventually.

\_\_\_\_\_ ads can talk about testimonials, what they will get from the webinar as a gift etc.

“

*The riches are in the niches!*

## SESSION #11: MILLION DOLLAR EMPIRE BUILDER PANEL



Holly Simpson



Dirk Davidek



Beverly Davidek



Shane Young

Journal Prompt: Consider your long-term goals for your business. Are you planning on eventually selling it or passing it down as a legacy? How do you see your role in the company evolving in the future?

Before becoming a lawyer, Holly was a \_\_\_\_\_.

Holly is a great example of how quickly the \_\_\_\_\_ can happen in estate planning.

Shane was a valedictorian in high school and went to Pepperdine, majoring in \_\_\_\_\_.

Shane's first pro bono case was in the area of trust and derivatives, specifically \_\_\_\_\_.

What is Ali's advice for business owners regarding investment and taxes?

Journal Prompt: What was one test that life gave you to say, "Are you really serious about doing this?"



## SESSION #12: SOLO LAW PRACTICE PANEL



Allison Phillips



Debra Koven



Karl Chen



Rebecca Strub

How many clients does Rebecca typically serve in a month? \_\_\_\_\_

Debra has been practicing over \_\_\_\_\_ years.

Debra found success in marketing in \_\_\_\_\_ groups.

Karl says the problem with solos sometimes is that you are solo – you have no \_\_\_\_\_ partner.

The first step in moving from a solo practice to a staffed practice is hiring a \_\_\_\_\_.

Allison felt like she was owned by her \_\_\_\_\_ calendar.

Many solo lawyers hold \_\_\_\_\_ to drive traffic and engagement.

What program does Karl use for data gathering and guardianships/probate? \_\_\_\_\_

Allison uses \_\_\_\_\_ for CRM case management.



*Everyone you meet is a potential for curiosity questions.*

The most important part of building your practice is having the \_\_\_\_\_ service you know how to offer, with an \_\_\_\_\_ process that works at a high enough \_\_\_\_\_ that you can deliver on it.

Debra learns estate planning through the NLBM group, Facebook groups, coaching call, and \_\_\_\_\_ materials.



## SESSION #13: STAFFED PRACTICE OR PART-TIME LAW BALLER PANEL (\$300-600K/YEAR)



Deirdre O'Donnell



Natalia Ouellette Grice



Heather Pietroforte



Len Garza

The difference between a part-time law baller model and the million dollar empire builder model is how \_\_\_\_\_ you can be out of the office.

Heather decided she wanted to become an attorney in \_\_\_\_\_ grade.

Heather's coach's exercise on gratitude helped me shift my attitude and increase her clientele from \_\_\_\_\_ to \_\_\_\_\_.



*If we can shift your attitude, your success is inevitable.*

Deirdre's experience in \_\_\_\_\_ led her to step into law to help people.

Solos can only have \_\_\_\_\_ clients a month – and that's a stretch. In the staffed practice you get to \_\_\_\_\_ on your way to \_\_\_\_\_.

Before NLBM, Len was charging \$\_\_\_\_\_ for wills, but now he knows how to charge more without becoming a volume practice.

Nadia said law schools don't teach how to manage your \_\_\_\_\_.

Nadia's business grew \_\_\_\_\_% last year.

Journal Prompt: Consider what your business looks like this time next year? Who's on your team? What are you paying them? How many clients are you engaging? What are they paying?



## SESSION #14: SUMMIT WRAP-UP

Journal Prompt: Can you give an example of a time when you noticed a shift in your attitude and how it affected your business?

A large, empty gray rectangular area intended for the user to write their journal response to the prompt.

Life is constantly testing us to see how much we can handle. If you want more, life wants to give you more. It's important to decide what you truly want to do and not settle for things that don't \_\_\_\_\_ with your goals. Your starting place is to make the claim, say 'I'm in' and create what you truly want.



with Ali Katz

# ONE FINAL NOTE...

**WE ARE SO GLAD YOU DECIDED TO JOIN US FOR THE GREATEST ONLINE SUMMIT EVER FOR ESTATE PLANNING PROS (AND THOSE WHO WANT TO BE).**

You might be wondering where we go from here.

Hi, I'm Ali Katz, and I've been helping estate planning lawyers build businesses they love since 2007. And, now, I'm here to help you.

I see so many questions come into the free FB groups I'm in, looking for help on intake + engagement + serving clients, and after 20 years of trial and error and helping hundreds of lawyers build high 6 and 7-figure firms, I've vetted the best service providers in the field.

And, I know what it takes for you to "skip the line" from having to figure it all out on your own so you're not reinventing the wheel.

I've spent the past decade training an army of heart-centered lawyers in my unique, counseling-focused methodology for helping clients get to the bottom of what matters most when it comes to Life and Legacy, and then to document those choices with legal documents that stay up to date and continue to work throughout life.

These Personal Family Lawyer® firms were born from my own devastating personal experiences with failed estate plans created by well-meaning, but non-relationally trained or systems-oriented lawyers who just focused on the documents, and didn't anticipate the devastation of failed planning.

Now that we've got enough lawyers trained across the US to serve our communities (and we'll expand internationally next year), and I've been through my own initiations of raising adult children, healing my relationship with money and with my own parents, and learning to be a leader in the context of new paradigm business, it's time for me to return to my roots as an educator.



So, this Summit was born from my desire to share my gifts to the estate planning community that I see struggling to create systems, and build their law practices into businesses they love, serving clients with the best support available.

If you would love to build your law practice into a business using Life & Legacy Planning as a Personal Family Lawyer...

You can [apply to speak with a Law Business Advisor \(LBA\)](#). Please note: since our LBAs are extremely full due to high demand, and we want to make sure you get the most value from your call with them, we're moving to an application system:

- Your first step is to apply for a call.
- Then, you'll be given some "required reading" to prepare for the call, and talk with our Intake Coordinator to confirm your readiness.

Get the proven model, systems, and the accountability you need to start growing a law practice and life that you love! Beginning with the Life & Legacy Planning Program we help you every step of the way to build law practice systems for attracting, engaging and servicing clients in a predictable and profitable way.

**Click here to apply to speak with a Law Business Advisor (LBA) today.**

