

A Funny Thing Happened on the Way To... (Some of My Craziest Seminar Stories from Over the Years)

By Philip J. Kavesh, J.D., LL.M. (Taxation), CFP®, ChFC,
California State Bar Certified Specialist in Estate Planning,
Trust & Probate Law

You may already know that one of my favorite things in life is presenting educational seminars on estate planning, whether it be seminars to market my law practice to the consumer public or presentations before my fellow estate planning colleagues. What you may not know - - and I've been asked to share with you here - - are some of the unusual occurrences I've experienced in doing over 2,000 seminars for my law practice over the past 25 plus years. I've had so many funny, odd and not-so-funny events happen on the way to, during and after seminars that I really have to probe my memory to pick out the most unusual ones.

Of course, I've encountered all the "usual" goofs that any seminar speaker has experienced over time. I've traveled to the wrong hotel, or gotten there on the wrong day and time. Or, I've arrived to the right venue and found the seminar room locked and no one could find the key, or found the room open but all the chairs locked up in the storage closet with no one having the key. I've forgotten the slides or handouts or brought the wrong ones. I've suffered equipment failures, power outages and even overhead sprinklers going off! However, I'll bypass all these mundane misfortunes and go right to the weirdest, most memorable occurrences.

Let me start with some of the "lighter" ones.

The Jokester & His "Match"

I recall that once, during a seminar, I was talking about how all your assets comprise your estate, even your antiques and junk - - and quipped "you know there's a fine line between the antiques and junk!". Immediately, a gentleman turned to his wife and blurted out, "Yeah, I know - - she's the antique and she says I'm the junk!" (to which his wife instantly reacted by hitting him in the face with her handbag!)



"Please Hold Your Questions Until the End..."

Another time, during a seminar, a lady began raising her hand above her head. I stopped and reminded her - - per the rules I set out when I began - - to please hold her question until the end and I would be happy to answer it then. But that didn't stop her. Moments later, she raised her hand again. I again had to nicely remind her to wait! Then, after 20 minutes, just when things appeared to be okay, she once again raised her hand, began waving it wildly back and forth and practically jumped out of her seat to get my attention. I finally caved in and said, "All right, I'll answer your question now" to which she shrieked out, "Can I go to the bathroom?" and then proceeded to run out of the room! (Wow, I guess as a youngster she must have attended a really strict school!)

The Sleepy Attendee

I can recall receiving many strange questions during the question and answer session at the end of my seminar presentations. One of my favorites came from an elderly man, seated in the front row, who had seemed to doze off at times during my two hour, detailed discussion of Living Trusts. When this discussion was over, he raised his hand and I politely asked him for his question. He stopped, seemingly locked in deep thought and then slowly asked, "What's

this here Living Trust thing you've been talkin' about?"

Please Have Some Seconds

Another time, at a dinner seminar, I got to the questions part, but no one raised their hand so I stood there and waited for a moment. Finally, I saw a hand go up and I said, out of relief, "Good, a question!" to which the person responded, "Can I get another dinner and dessert to take home?"

That reminds me of a near riot I once caused at the end of a seminar...

"The Riot"

I was expecting a large audience and we had put out a big spread of gourmet cheeses, fruit, rolls, desserts and candies. When I finished the seminar, I noticed the great amount of food left so I said, "Help yourselves to any of the food." You should have seen the people bolt out of their seats and stampede to the back of the room - - then fight over the spoils, with ladies elbowing each other out of the way and shoving food in their handbags!

I've also had some "heavier", more serious events occur.

We Will Never Forget

One emblazoned in my mind happened just as I was about to leave my home to go to a seminar. I had spent a great deal of time and energy preparing for this particular seminar and I was very pumped up to give it - - my first ever on the new invention I had just created, the "IRA Inheritance Trust®". As I was halfway out the door, my wife screamed, "Your Mom is on the phone and she sounds like she's having a heart attack!". I ran to the phone and my Mom was shouting almost incoherently, "Turn on your TV - - right now!". I did and just as the picture came on I saw an airplane fly into the side of a skyscraper building. The day was September 11th, 2001 and after I calmed down my Mom (who lived close to New York and was afraid for her life!) I called my office to cancel the seminar, a small misfortune compared to the horrible suffering of others on that day.

Another False Alarm?

I've also had to call off seminars midway through them due to other unexpected, near catastrophic events. Once I was speaking at a hotel where an irritating, loud fire signal repeatedly went off, followed by an announcement over the loudspeaker, "Sorry for the false alarm!" So when it happened for about the fifth time, I just calmly said to the audience, "Don't worry. Stay seated. It's probably just another one of their false alarms." Everything did seem fine, until a few minutes later a man in the audience jumped out of his seat and motioned to the window where we

could all see smoke and then flames lapping up the side of the building! Fortunately, we all got to safety. But you can imagine all the chaos as fire engines were pulling into the parking lot, attendees were scurrying in all directions and I was frantically chasing them to grab their response forms before they got into their cars! (I quickly learned the value of having an assistant accompany me at my seminars!)

Thanks to the Men in Blue

Another mid-seminar disaster was far more strange. As I was speaking, I faced the back of the room where the entry and exit doors were located across from each other. All of a sudden, one door swung wide open and a man with a hoodie pulled over much of his face ran across the back, heading for the other door - - followed by a policeman with his gun drawn! They continued their chase out of the exit door, and shortly thereafter police backup cleared the audience and me from the room. As we were standing in the parking lot watching the police place a tape barrier around the building, I realized, to my dismay, that all my seminar equipment, handouts and keys to my car were still in the room - - and I had to travel to another location in about 45 minutes to give another seminar! This time not only didn't I get the attendees' response forms, I had to call off the other seminar too because I wound up spending hours swapping jokes with the policemen in the parking lot before they finally let me back in the room. (You know, I never did find out whether the hooded man was apprehended!)

An Important Lesson Learned by Everybody That Day

But the one mid-seminar disaster I most often recall was scarier than either a roaring fire or armed police chase. While I was speaking, I noticed that a man in the audience suddenly slumped over and looked like he was about to fall out of his chair. The person seated next him shouted out, "Dial 911!" My assistant did so immediately and laid the apparently unconscious man flat on the floor. Seemingly within a minute, paramedics rushed in, placed him on a gurney and wheeled him out. No one knew if he was dead or not, or whether he could be revived. After all this disruption, I tried my best to return to my seminar presentation and seemed to have recaptured the audience's attention, when all of a sudden the paramedics wheeled the man, now in a conscious and seated position, back into the room! As the rest of us looked at him in shock, he explained, "I'm okay. Just had a minor heart attack because I forgot my medicine - - but I wasn't going

to let them take me to the hospital because I really need to listen to what you have to say!" His entrance seemed right on cue because I was just about to flip to the slide where I explain that the reason people don't have any estate plan, or one that has become old and out-of-date, is procrastination - - and that no one has a guarantee they'll have a chance to take care of it tomorrow! Needless to say, everyone at that seminar wound up making a consultation appointment! (And, by the way, there may be a lesson in this story for you, too!)

Despite all the wild, crazy, funny (and at times not-so-funny) things that have happened on the way to and during my seminars, there does occur a wonderful event after almost every seminar nowadays that keeps me plugging along after all these years. Invariably, someone - - either a client of our firm, or a trustee who has served on behalf of an incapacitated or deceased client, or a client's beneficiary - - walks up, extends his or her hand, and personally thanks me for how we have helped. That alone makes all the seminar "madness" I've endured worthwhile. It serves as a reminder why I got into this area of law and have devoted to it over half my lifetime.

Hopefully, if you're an estate planning professional, I haven't completely scared you away from doing seminars with all of my stories. If anything, I hope you take away that despite the crazy events in life that are out of your control, you can still find a great deal of success in marketing your practice and your services via seminar marketing.

ABOUT THE AUTHOR:

Attorney Philip J. Kavesh is the principal of one of the largest estate planning firms in California - - Kavesh, Minor and Otis - - now in its 34th year of business. He is also the President of The Ultimate Estate Planner, Inc., which provides a variety of training, marketing and practice-building products and services for estate planning professionals. If you would like more information or have a question for him, he can be reached at phil@ultimateestateplanner.com or by phone at 1-866-754-6477.

