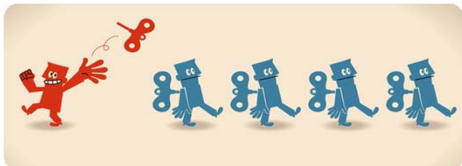
WEALTHCOUNSEL 2017 SYMPOSIUM
LUNCH N' LEARN TALK

PRESENTATION HANDOUTS
& RESPONSE FORM

WARNING: I'm a Contrarian!



- If you do the same as you've been doing, or the same as everyone else, you'll get the same results (or worse!)
- But, I'm not a contrarian just to be difficult!
- I test and continue to do what's proven to work!

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Tested & Proven Strategy #1

You're Sitting on a Goldmine: Double Your Revenue By Simply Getting More Existing Clients Back in the Door!

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"But how do I get existing clients to come back in?"

- Train your clients to expect a periodic, free checkup meeting
- Simple reminder postcard
- Followed by low-cost, in-house call
- Periodic in-house client review seminars

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"If I get clients to come back in, what do I sell them?"

- New and improved products
  - "New Age" Durable Power of Attorney, emphasizing care issues later in life
  - Better "B" Trust (or Irrevocable Trust upgrade)
  - Better estate plans
    - Upgraded "Inheritance Trusts"

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"If I get clients to come back in, what do I sell them?"

- New Services
  - Standalone IRA Beneficiary Trusts (or "SRTs")
  - Medicaid ("MAPTs"), Pet Trusts, etc.
- Other "Support Mechanisms" that generate more revenue down the road
  - Successor Trustee Manual
  - Docubank

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"Wait, Phil. I've got a prepaid client maintenance plan!"

- Modify it
- Or, better yet…

BLOW IT UP!

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Client Maintenance Plan vs. Free Service Package

500 Clients – 85% sign up (425)
for $300 per year maintenance plan = $127,500
x 3 years (assuming all stay in plan) = $382,500
GROSS PROFIT

vs.

Free checkup meeting once every 3 years
35% (175) do additional work at $2,200 = $385,000

AND ONLY 1/3 THE WORK (OR LESS!)

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"What if I don't sell anything at client review meetings?"

- Plant seeds that will mature
- Ask for client referrals
- Get on newsletter list, have forward to others
- Generate referrals from other professionals
- Generate speaking opportunities
- Have happy clients who will tell others, particularly when you send a thank you card!

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Don't Have an Existing Client Database?

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Tested & Proven Strategy #2

A Commonly Overlooked (and Feared!) Marketing Strategy for Engaging New, Pre-Qualified Clients on a Regular and Consistent Basis

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Do MORE Seminars!

- Don't have to be expensive public seminars (although it's not about expense, it's about ROI)
  - Can be in-house, low-cost
  - Use e-mail newsletter and other inexpensive e-marketing
- *"I can't/don't want to speak in front of people!"*
  - Sorry to tell you this, but *you already do!*

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Do MORE Seminars!

- Helps sort out unqualified, unmotivated prospects, before they waste time meeting with you!
  - In particular, leads generated from internet and social media
  - Plus referrals from clients or professionals
- Makes your meetings more efficient!

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Do MORE Seminars!

- You get to tell your story, what sets you apart and build trust and rapport
  - Needed in a world of internet, DIY and low-priced competition
  - Emphasize your personal approach
  - TIP: Quote your prices!
- Make the appointment *right at the seminar!*
  - Offer an incentive
- Seminars DO work!

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Tested & Proven Strategy #3

Smarter, Targeted Marketing

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Know Your Clients and Your Market

- Here's what we are finding to be our best target
  - Homeowners in certain zip codes
  - Over age 50
  - Income irrelevant
  - Already have an estate plan!

- Identify this criteria through mail list companies
- Target your message
  - It's not about avoiding probate and estate tax anymore!
- Test, test, test!
  - But, do it carefully and intelligently!

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Open New "Local" Offices

- Make yourself more easily accessible to a larger audience
  - Particularly leads already generated outside your immediate service area
- Keep cost down, using executive suites and staffing office "by appointment only"
- Plot locations using zip code map, mail list surveys, and drive time
- Be conscious of your State Bar Rules
- In-house seminars
- Bring in existing clients, which leads me to….

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Tested & Proven Strategy #5

THE GOLDEN TICKET:

The Most Overlooked (and Under-Utilized) Strategy for Quickly Growing Your Practice!

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Merge/Acquire Other Practices

- Best ROI ever!
- There are ways you haven't thought of to finance the purchase, legally and ethically, if done carefully
- Once acquire, do blitz marketing with client seminars and upgrade package
- Do it NOW, because it's a buyer's market!

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BONUS STRATEGY!

Client Amendment Project

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Client Amendment Project: New & Improved Product

- An enhanced "Inheritance Trust" for "Grade A" beneficiaries
  - Beneficiary controlled
  - More asset protection
  - Better income tax consequences
  - More extensive Trust Protector provisions so can modify after Trustor dies
- Benefits to Your Practice
  - Replace lost estate tax planning revenue
  - Amend and restate virtually every Living Trust plan you've drafted (or see coming from other attorneys)
  - Improve your current plan and increase your fee
- Sign up for a free informational teleconference to learn more

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How Can We Help You?

- Complete Training Programs to help you implement the ideas discussed
- One-on-one, personalized assistance
- Monthly "Keeping Up With Kavesh" Subscription
- Be sure to stop by our booth to learn more
- Complete and turn in your Response Form
  - Indicate items you have an interest in and where we can help you!
  - Get a few *free* implementation tools from today's talk that may help you enjoy results right away!

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ANY QUESTIONS?

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PLEASE COMPLETE & TURN IN YOUR RESPONSE FORM

Date: Thursday, October 5, 2017

Name: ____

City/State: ____________________**Phone Number:** ________________

E-mail Address: ____

	Poor				OK					Excellent
I rate this presentation:	1	2	3	4	5	6	7	8	9	10

I have an interest in the following (check all that apply):

- ❑ *FREE* Items to Implement Today's Strategies
- ❑ *FREE* Informational Call on Your Breakthrough Client Amendment Package
- ❑ *FREE* Consultation to figure out how you can help me build my practice!
- ❑ Other: ____

Comments & Suggestions: