

## ESTATE ADMINISTRATION PROCESS TRUSTEE FOLLOW-UP PHONE SCRIPT

This follow-up phone call occurs between the initial follow-up letter, sent following the initial inquiry and notification about the decedent's passing and the second follow-up letter (sent 4 weeks after the first letter).

[IF SOMEONE ANSWERS]

**CALLER:** Hi, may I please speak with TRUSTEE NAME?

**CALLER:** My name is CALLER NAME and I am calling on behalf of YOUR LAW FIRM NAME. I am calling to follow up with you and see about scheduling your free meeting with an attorney in our office. As part of DECEDENT NAME's estate plan, you as the Successor Trustee are entitled to a free consultation meeting. In this meeting, ATTORNEY NAME will review the estate plan to determine what, if any, actions need to take place, and the extent to which we may be of assistance to you. Would you be available on DAY, DATE at TIME to come into our CITY NAME office?

[IF NO ANSWER OR MODIFY IF SOMEONE ELSE ANSWERS AND YOU HAVE TO LEAVE A MESSAGE WITH SOMEONE]

**VOICEMAIL MESSAGE:** Hi, this message is for TRUSTEE NAME. My name is CALLER NAME and I am calling on behalf of ATTORNEY NAME from YOUR LAW FIRM NAME. Mr./Ms. ATTORNEY LAST NAME asked me to give you a call regarding the Estate of DECEDENT NAME. Can you please return my phone call at ###-###-#### at your earliest convenience? Again, that number is ###-###-####. Thank you.