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INFORMATION ON
THE SUCCESSOR TRUSTEE SEMINAR PACKAGE

Many estate planning attorneys prepare a Living Trust for their clients and then never see their clients again. For those who do see their clients for updates on a regular basis throughout the years, they still have not done a whole lot to develop a relationship with the Successor Trustees of the clients to properly prepare them for when the time comes or even be a familiar face or name of where to go when the time comes.

This is why nationally renowned estate planning attorney, Philip Kavesh, has put together a Successor Trustee Seminar—a presentation just for your clients and their Successor Trustees!

The seminar entitled, "The ABC's of Successfully Acting as Successor Trustee", is helpful for explaining the estate planning process to your clients' Successor Trustees before diving in and explaining the important do's and don'ts of being a Successor Trustee. Paired with Phil's popular plain-English Successor Trustee Manual, this seminar is a powerful tool to not only educate your clients' Trustees, but to also produce more revenue in the form of client reviews and updates, Successor Trustee Manual sales (right at the seminar!) and potential new estate plans generated from Successor Trustees realizing the importance of them getting their own estate planning done!

Whether you're an estate planning attorney, financial advisor, CPA or other type of professional, being able to help your clients and explain the duties and role of the Successor Trustee is critical. So many of your clients have selected someone as a Successor Trustee who has never done this before and will be lost when the time does come. Worst yet, if they've chosen their children to act (as many do), their children will also be dealing with either the loss (or perhaps the loss of physical or mental capacity) of a beloved parent amidst having to take on this crucial role. You can help them out before it's too late and start establishing connections right now!

The Successor Trustee Seminar is one of the most widely attended seminars Phil's law firm holds each year with each client bringing multiple people along with them. Plus, with the use of Zoom and other technology, you can give this seminar virtually as a webinar and get this valuable information to your clients' Trustees who might not live in the area!

The Successor Trustee Seminar is available for a reasonable one-time licensing fee and you will receive everything including the PowerPoint slides, seminar script, seminar outline and response form, and the marketing materials to drive your clients and their Successor Trustees to the seminar!

This product is delivered digitally (within one business day or less) and includes the following:

- **PowerPoint Presentation** with 49 slides to help educate and inform existing clients, prospective clients and their Successor Trustees about important duties of the Successor Trustee with a promotion to purchase the Successor Trustee Manual and for existing clients to come back in for a review of their estate plan and for Successor Trustees to book an appointment and get their own estate planning done!

- **Seminar Script** so that you will know exactly what to say for each and every seminar slide, done in a powerful and effective manner to educate, entertain and engage the audience, helping convince attendees to make a decision with you and your firm at the end of the seminar.

- **Marketing Materials** featuring a direct mail piece that was used to drive attendees to the seminar.

- **Seminar Handouts** including a presentation outline to help attendees follow along and a response form to help capture leads at the end of the seminar.

- **Implementation Tips** with 60 minutes of instructions on how to properly implement this seminar in your practice so that you can quickly hit the ground running immediately after your purchase!

The seminar slides are in a modifiable Microsoft PowerPoint file and the seminar outline, marketing materials, and some of the other seminar handouts are modifiable Microsoft Word files for you to be able to easily modify, edit and brand to you and your practice.

NOTE: The Successor Trustee Manual is a separate product, but can be licensed together with the Successor Trustee Seminar Package at a discounted bundle fee. See "Product Options" for more details.

For more information or to license our Successor Trustee Seminar Package, click here.