

FREQUENTLY ASKED QUESTIONS

May 1 & 2, 2025 | The Woodlands (Houston), Texas

QUESTION: Is The Ultimate Level the right fit for me and my practice?

ANSWER: The event is suitable for attorneys and practices of all levels. Phil Kavesh's law firm, upon which our presentation is based, has been in business for over 43 years and has been through all the stages of building a super-successful estate planning practice.

- If you're just starting out as an estate planner or have a young practice, we will show you how to jump immediately to a fifth year (or greater) level of business experience and profits, without having to go through all of the expense, headaches and stress of "trial and error" on your own.
- If you already have an established and growing practice, we will show you exactly what you'll need to do to just "tweak" it and quantum leap you to the next level more quickly and without all the growing pains.
- If you have a mature practice with lots of clients (and maybe lots of marketplace competition) and perhaps you're considering phasing down or an exit strategy, we will show you how to utilize the "gold in your vault" to boost your firm's profits, build up the value of your firm, and obtain a *bigger exit price* when you want to retire!

★ Also, no matter whether your practice is located in a rural or urban area, you'll still see a dramatic increase in your firm efficiency, revenue and profits!

QUESTION: How difficult are your techniques to implement? Will I be able to duplicate them?

ANSWER: Hundreds of attorneys who have attended prior Ultimate Level events have already successfully implemented our techniques and strategies, so you can too! The key is we will help you **create your own definite, step-by-step implementation plan** before the conclusion of the event. We also offer ongoing implementation coaching which many have found helpful to hold them accountable and attain *maximum* results when they return to the office!

QUESTION: Will I have to spend a bunch of money on additional products or marketing materials after the event in order to see results?

ANSWER: No. You will walk away with **several practical strategies and tools to be able to implement into your practice right away to see results**. Additionally, our seminar marketing techniques will be discussed in the context of your overall customer service journey and making that process more efficient and productive for your firm, so you can jump start your implementation and results by simply shifting your current intake process for prospective

clients, but also you can increase your number of leads simply by marketing to your existing clients and professional referral sources, as well.

We will show you in detail at the program how when you smartly invest in marketing your practice, the greater will be your return! It's not the cost of marketing that counts, it's the return on your investment! **All of the marketing we'll teach you has been tested and proven to get results!**

QUESTION: I'm more interested in reducing my work time and improving my quality of life than I am in increasing my revenue production. Is this Ultimate Level event right for me?

ANSWER: Absolutely! The strategies and techniques that you will learn have allowed attorney **Phil Kavesh to reduce his work time at his law firm to *only one day a month!*** And his out of office work time to less than 10 hours per week! Even more miraculously, since he has reduced his time in the office, **his firm's revenue production and profitability have actually gone up!** Why? Because Phil has systematized every element of the practice so that it can work for him instead of the other way around. It's also now allowed for him to focus on the tasks that he loves and enjoys doing (marketing!), which helps align him with what the firm needs him from him, while the rest of his law firm team carry out the day-to-day operations.

★ If you want to **create a passive income generator** and be able to **take more time off** (or just reduce the stress and your time in the office), **The Ultimate level is *definitely for you!***

QUESTION: How can I believe this event is so good and worthwhile when I've never heard of it before?

ANSWER: Attorney **Phil Kavesh has been conducting these types of events going back to the early 90's** and has, over the years, assisted hundreds of estate planning attorneys to **improve the daily management and bottom-line results of their practices**—not to mention the quality of their lives. At The Ultimate Estate Planner, we have been conducting these life-changing events dating back to 2013 and have continued to improve and enhance this event to help address today's business landscape. But, don't just believe us. [Click here](#) to **check out testimonials from attorneys and staff** from all over the country who have previously attended our Ultimate Level event.

QUESTION: What's included with my registration to The Ultimate Level?

ANSWER: Your registration includes a comprehensive package to ensure you get the most out of your experience:

- **Breakfast and Lunch on Thursday and Friday**
- **Full-Day Live Presentations on Thursday and Friday**
- **A 3-ring binder filled with presentation materials and over 80 exhibits**
- **Welcome Reception (Happy Hour) on Thursday, following the sessions—great for networking and unwinding**
- **Personalized, Customized Consultation (for selected firms) held during the event**

Please note that **travel to/from the event, hotel accommodations, dinners, and any incidentals** are **not included** in your registration fee and are your responsibility.

💡 **Want to make the most of the event?** Be sure to take full advantage of the meals, presentations, and networking opportunities included!

QUESTION: Do I have to pay a continuous license or membership fee to use the materials I receive or purchase additional products or services?

ANSWER: No, you are **not required** to purchase any additional products or services to gain value from attending our events. However, we believe that **true results** come from the right combination of **strategy, tools, and coaching**.

While **The Ultimate Level** provides **valuable strategies** and essential tools for success, the most successful attendees typically enhance their experience by also investing in additional **tools and implementation coaching**. These are available at a **special discounted rate** when purchased at the event, giving you the opportunity to further accelerate your progress and achieve even greater results.

QUESTION: I understand that I can add staff or associate attorneys to my registration for a significantly reduced fee. Any guidance on who is best to attend with me and how late do I have to register any additional members of my firm?

ANSWER: **Bringing key staff or associate attorneys** with you can greatly enhance the value of your experience. When your team attends alongside you, you get their input and **"buy-in"** from the start, which means you won't have to spend time explaining and deciphering your notes after the event. This ensures everyone is on the same page and ready to implement new strategies together as soon as you get back to the office!

Which of my staff should attend?

We recommend bringing individuals from your firm who are involved in setting up systems, processes, or infrastructure. Typically, attendees include:

- **Office Managers**
- **Assistants & Paralegals**
- **Marketing Coordinators**

When is the latest I can register additional members?

You can add staff or associate attorneys to your registration as late as 30 to 45 days prior to the event (subject to availability).

💡 **Want to maximize your firm's impact?** Consider bringing your entire team along for the full experience! It will save you time having to go over with them all that you've learned (if you ever even find the time to do it!).

QUESTION: Where should attendees stay, and do you have a group discount at the hotel?

ANSWER: The event is taking place at [Embassy Suites by Hilton The Woodlands® at Hughes Landing](#). Once your registration is confirmed, you will receive more information on how to book your hotel room. We have a discounted room block and we will provide details as to how to book your hotel room with our group discount. Due to limited availability, we highly recommend that you book your hotel room immediately.

QUESTION: When should I plan on arriving?

ANSWER: We recommend arriving by the **end of the day on Wednesday** before **The Ultimate Level** begins to ensure you're fully rested, prepared and ready to dive in.

Even if you're within driving distance of the event location, we highly encourage you to stay at the event hotel. This will allow you to focus only on the event, experience the **full impact of the 2 days**, and ensure you don't miss any valuable content or networking opportunities.

Since we kick off bright and early on Thursday morning, it's important to be **at the venue and ready to go** so you can start strong and maximize your experience from the very first session.

QUESTION: So I can book my travel appropriately, what time do you recommend leaving the Event?

ANSWER: On the final day of **The Ultimate Level**, we have an action-packed schedule planned, but the day will conclude no later than **5:00pm local time**. The afternoon will feature **individual consultations** followed by an **interactive implementation session**—an experience you won't want to miss!

If you're flying home, we strongly recommend booking your return flight for **Saturday** or **staying through the weekend** and departing on Sunday for a more relaxed travel experience.

If you prefer to leave on **Friday**, we advise booking your flight no earlier than **8:00pm local time** to ensure you have enough time to travel to the airport and make your flight without stress.

QUESTION: What is your refund/cancellation policy for event registration?

ANSWER: We understand that plans can change, so we've designed our cancellation and refund policy to be fair to you, while covering the necessary expenses related to hosting our events for us.

Here's how it works:

◆ **Cancellation 45 Days Before the Event:**

If you cancel at least **45 days before** the event, you will receive a **full refund** of your registration fee.

◆ **Cancellation Within 45 Days of the Event:**

After the 45-day window, we incur non-refundable expenses, and cancellation becomes more challenging. However, if you or **The Ultimate Estate Planner, Inc.** can find another firm to take your place, we may offer:

- A **partial or full refund** of your registration fee, or
 - The option to **transfer** your registration to another event within the next **12 months**.
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QUESTION: What if I attend the Event and it's not what I expected?

ANSWER: We believe in our Event enough to back it up with a **100% Money-Back Guarantee**. If you attend both days of The Ultimate Level event (in their entirety) and don't feel what you've

learned was worth your registration fee and you are not completely satisfied, we offer a **full refund** at the conclusion of the event. Simply speak with one of our staff members to request your refund. This guarantee ensures you can register with confidence, knowing we stand by the value our events provide.

Have Other Questions?
Call us at 1-866-754-6477

**Ready to Improve Your Revenue
and the Quality of Your Life?**

REGISTER NOW