LWP CONNECTION MAY 2015

REGISTRATION FOR LWP'S TRI-ANNUAL PRACTICE ENHANCEMENT RETREAT CLOSES MAY 15

Just a quick heads up that **we're closing the doors, May 15th, to register for our Tri-Annual Practice Enhancement Retreat**, June 1-5 in St. Louis, MO.

You won't want to miss the opportunity to attend **one of the industry's most *in-depth* training programs for Estate and Elder attorneys** (and their teams!), focused on helping you:

- Freshen up on your legal/technical knowledge and **discover new lucrative offerings to weave into your current business model**
- Stay up-to-date on changing laws and best practices that affect your business
- Learn how to host consumer-focused presentations, effortlessly fill the room and **master the art of "speaking to sell"**
- Implement guerilla marketing strategies for any budget that work *right away* **to fill your calendar with high quality estate or elder law clients**
- **Develop your legal team into efficient and productive staff members** who come to the office each day excited to serve your clients with excellence, become your greatest evangelists in the community and *love* your practice as if it were their own.

It's a weeklong event with many different trainings and focus sessions to choose from based on YOUR unique needs and the needs of your staff members. Here is just a little ***taste*** of some of the focus sessions and programs offered:

- **Mastering The Business of Law** - A roadmap to increasing office efficiency and revenues.
- **Train the Trainers: Speaker School** - Learn a more strategic way to give presentations that leaves audience members rushing to the podium after your talk to sign up to work with you!
- **Legal Technical Training**, including: General Medicaid Laws & Rules, Penalty Period Scenarios, Crisis Planning, Debrief of VA Benefits, Trust Fundamentals, Design Strategy, Strategic Planning for Qualified Assets and more.
- **Converting Prospects Into Paying Clients** - Mastering Client Attraction and Retention, Enrollment with Initial Contact and Initial Meeting and Value Proposition Pair Practice.

This is your chance to learn from some of the most respected and successful leaders in Estate and Elder Law. These are attorneys that have grown their practices to seven figures and beyond, are doing what you want to do and will **openly show you their secrets and how to duplicate their success** without costly learning curves or trying to sell you something.

We promise you'll be ready to hit the ground running with new strategies and plans for explosive growth **your first week back in the office!**

Hope to see you in St. Louis!

Register now at: **http://retreat.lawyerswithpurpose.com**

"THE WILL TO WIN, THE DESIRE TO SUCCEED, THE URGE TO REACH YOUR FULL POTENTIAL...THESE ARE THE KEYS THAT WILL UNLOCK THE DOOR TO PERSONAL EXCELLENCE." - Confucius

THE KEY BENEFITS OF TEMPLATES

David J. Zumpano, Esq, CPA, Co-founder Lawyers With Purpose

Recently we had a member complain that our system "didn't work the way he wanted it to". We later discovered he was on the ListServ of another major estate planning organization and referred to one of our planning templates for designing and drafting our trusts.

Immediately, many people on the ListServ requested a copy of the template, which he kindly obliged. Aside from violating his licensing agreement and being guilty of conversion, he did not even understand and appreciate the value of what he was providing, while those requesting it, did.

So let's examine why templates are so powerful. Typically, templates are used as a guide for us to create legal documents. The challenge is, most documents are lawyer centered and the template is merely a reflection of the document "options" to ensure you know what options to include. I believe a template should be used to guide the attorney to counsel the client on *all options* available to achieve the client goals, not just the specific provisions allowed or limited in a particular document creation program. That's where properly drawn templates are extremely powerful.

A properly drawn template must match and tie to the software that actually generates the document and must allow the attorney to utilize *any design choice* the attorney deems appropriate to achieve the client's goal. Lawyers with Purpose document templates, have unlimited customization ability that integrates 100% with the software to accommodate it. So rather than being restricted to the options in a typical document instead, a properly created template that's integrated with the software will permit true customization at every element of design in the document being created. A proper template will not only allow you to custom design each and every document to the needs to the client, but more importantly, integrates the custom design into all of the different legal documents together with a single entry.

Our templates integrate all legal issues for the client to consider and when used with the software generates all documents to complete the client's plan with the customizations. This is consistent with the way clients think and more importantly, takes each of the custom drafting options of the client and properly integrates them across all different planning documents with one single entry and one single template. This creates not only better plans, but a more efficient way of designing and drafting them to accomplish the clients overall goals.

Perhaps the greatest benefit of a powerful template is when you make choices on it and when it's implemented into the software, it warns you of inconsistent choices that you have made that threatens the overall plan you've selected for the client. **This is where the power of artificial intelligence in the LWP client-centered document creation system is so critical.** By using the template it guides the attorney to all of the various counseling issues available to a client in each area of their life. Thereafter choosing the options that are most helpful for the client the template is then shared with a paralegal or drafter in your office who will then translate it into the software to create the will, healthcare proxies, powers of attorney, personal care plan, revocable trust, and irrevocable trust, **all from a single entry**. What's more powerful, are the custom choices the client makes are integrated into each of those documents, <u>with a single client interview</u> and single entry into the software. As further protection, if the attorney chooses to elect different variable in the planning strategy that are inconsistent with the overall goal of the client the software maintains and keeps track of all choices to alert the attorney if he has created a scenario that might put the client's overall objectives and goals at risk.

So how important and effective can templates be? Can you imagine the power of templates when they're properly designed and integrate with the document creation system? Discover the power of templates to you and your clients and how to utilize them to integrate the planning strategy to achieve client's goals.

ARE YOU ATTENDING THE WEEKLY LIVE CASE STUDY REVIEW? IF NOT...WHY?

Join LWP industry leaders for a weekly LIVE Case Study Review webinar – a Weekly Legal-Technical hour dedicated to reviewing real case studies hitting Estate Planning and Elder Law attorneys' desks across America. This is an interactive discussion of What's Hitting Law Practices this Week with a LIVE analysis and legal advice to support and guide LWP attorneys in their practices, week-in and week-out.

FOR ESTATE AND ELDER LAW INDUSTRY LEADING TOOLS & TECHNIQUES MAKE SURE YOU ARE READING OUR BLOG

HTTP://BLOG.LAWYERSWITHPURPOSE.COM

MEMBER OF THE MONTH

Sean Curran
Reading, PA

What is the greatest success you've had since joining LWP?
My greatest success has been the compressed time frame of launching from scratch to a viable practice. When I was considering whether I was going to join, I remember Molly Hall telling me the range of what I could expect in revenues within a certain time frame if I followed the system. I have tried to do everything that Nedra, my implementation coach, told me to do - even when I really didn't want to do it and experienced success because of it. Everything is there to start a viable practice, develop into a mature firm and ultimately have the lifestyle you want. Even though I am still building, I have a clear vision of where I am going to be and I know LWP will take me there.

What is your favorite LWP tool?
When I first started, I looked at the tools as separate and distinct from each other. I now look at them as elements of a single system because they all work together in a very tight process. That said, I love the Synergy meeting for client development; the Estate Planning Audit/Vision Clarifier for creating trust through understanding; and the Coaching to keep my practice on the right path. However, the most impactful tool has to be the asset protection analysis opinion letter. I have gotten financial advisors to refer clients based on the demystification of asset protection. Clients generally don't want to engage attorneys because they think they have to explain their situation which will result in expensive legal bills without adequate understanding of what we are doing with their stuff. This tool creates immense value to the client and the financial advisor because it is an immediate, no cost answer that gives them clear guidance and understanding. The first impression of you is that you have already solved a problem - it is the foundation of the value proposition.

EVENTS NOT TO BE MISSED

Live Case Study Review
Every Monday-4:00 PM EDT

Marketing Roundtable
2nd Friday-12:00 Noon EDT

VA Tech Training
3rd Thursday-3:00 PM EDT

Veterans Marketing
3rd Friday-3:00 PM EDT

Practice With Purpose
June 1-3 St. Louis MO

Train The Trainers: Speakers School
June 1-2 St. Louis MO

How Your Protect Your Stuff Specialty Workshop
June 3 St. Louis MO

Tri-Annual Practice Enhancement Retreat
June 3-5 St. Louis MO

To register for an event, visit our events page
LawyersWithPurpose.com/Events-for-Lawyers.php

LAWYERS WITH PURPOSE
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New Hartford, NY 13413

ALMOST SOLD OUT! ONLY 8 SEATS REMAINING!

Speakers School is a two day program designed with the LWP™ unique **Train the Trainers™** methodology. If your goal is to speak, then Speakers School will get you started, and if you're a pro it will help you "sharpen the saw." Learn the **three core qualities** that separate excellent trainers from the rest.

Register today at: http://retreat.lawyerswithpurpose.com