LWP CONNECTION JUNE 2015

WHAT YOU MUST HAVE FOR YOUR NEXT WORKSHOP...

You may have heard by now that Dave rolled out the new "How To Protect Your 'Stuff' In 3 Easy Steps" workshop at our June Tri-Annual Practice Enhancement Retreat in St. Louis!

Attendees of this Specialty Program walked away with the tools designed to get butts in seats AND relay their value proposition to the marketplace, get hired and knock out the competition.

The materials are designed to:

- Set expectations for prospects
- Demonstrate your values
- Transform complex legal-technical into simple stories clients relate to
- Enroll lifetime clients instead of just document creation
- Measure the effectiveness of the stories
- Enroll
- Understand the difference between planning vs. documents
- Open, deliver and close the workshop
- Deliver your personal story to connect

If you weren't able to attend this program, the below materials are now live on the members site to support you with implementing the NEW "How To Protect Your 'Stuff' In 3 Easy Steps" workshop into your estate or elder law practice:

- Handouts
- PowerPoint
- Overheads
- Speakers Notes
- Evalutions
- Marketing materials
- Video of the workshop
- Audio transcription of the "stories"

Make the time to review these materials and get from lead generation, to presentation, to lead conversion! For more information on where to find this, email Molly Hall at mhall@lawyerswithpurpose.com

"You know, sometimes all you need is twenty seconds of insane courage, and something great will come of it."

Benjamin Mee, *We Bought a Zoo*

PLANNING TO PROTECT ASSETS FOR THE SPOUSE & FROM THE "NEW FRIEND"

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

As an estate planning attorney I come across many couples who do estate planning that have been married 30, 40, 50 or more years. A common question I ask is do you want to plan to protect your half of the assets from your spouse's "new friend" after your passing. It usually gets a chuckle but is often as an important issue because each of us knows someone who lost a spouse and now has a "new friend". Most couples are willing to address the issue because ultimately they want to ensure their "stuff" gets to their children or beneficiaries. Similarly, those in second marriages want to be able to provide for their current spouse without disinheriting their loved ones.

It is important to accept our individual needs for companionship are essential to humanity and in no way does kindling a new friendship or romance after a loss of a spouse in anyway negate the love one had for a deceased spouse. Think of it as an "and" rather than an "or". The question becomes who gets your half of the assets accumulated during your life, your beneficiaries or your surviving spouses, new friend? The greatest threat to your assets is if your health fails and the cost needed for care. Many couples leave assets to their spouse and "trust" the spouse will provide as they planned. The challenge occurs however, when the surviving spouse needs care and appoints their new friend or in the case of a second marriage the spouses children, as power of attorney. At that point, any hope of ensuring your stuff gets to your loved ones is greatly diminished.

Planning to protect your assets for your spouse, and from your spouse's "new friend", or in second marriages, ensuring your assets ultimately gets to your loved ones is a common goal both spouses agree on. Why? Because you don't know which one's going to die first so you want to ensure that no matter who does, the deceased spouse's share is always protected for the surviving spouse, and from "new friends", or the separate kids of the surviving second spouse. This planning is easily accomplished if you plan while you are alive and healthy, but becomes nearly impossible if you become incapacitated or die with it in place. We have all heard the horror stories of unintended beneficiaries getting all the assets after mom or dad dies. Don't risk it, plan for it. It's not complicated it just has to be planned for.

SAVE THE DATE: OCTOBER 19TH - 23RD PHOENIX, AZ

We're already planning and prepping for the October estate planning event. Are you? Get it in your calendar now! Here is just some of what we have to offer:

- Practice With Purpose – Monday October 19th – Wednesday October 21st;
- Tri-Annual Practice Enhancement Retreat – Wednesday October 21st – Friday October 23rd
- Just A Few Not to Miss Focus sessions Wednesday October 21st – Thursday October 22nd:
    - Elder Life Marketing – marketing the lifecare/social worker side of your practice
    - Veteran's Benefits Changes
    - Marketing Death Admin Services
    - Adding an Associate – How to bring an Associate into your Practice With Purpose and maintain standards
    - Using iPug™ to protect the Family Farm
    - The 90-minute Book - How to Get Published
    - How to Hire and How to Fire with Confidence

Are you stuck? Mark your calendar now & get in the room. You WILL have a breakthrough.

FOR ESTATE AND ELDER LAW INDUSTRY LEADING TOOLS & TECHNIQUES MAKE SURE YOU ARE READING OUR BLOG
HTTP://BLOG.LAWYERSWITHPURPOSE.COM

MEMBER OF THE MONTH

Jerry Reif
Saginaw, MI

What is the greatest success you've had since joining LWP?
I have been practicing in the area of Estate Planning, Elder Law and Asset Protection for over 35 years. The greatest success has been the total revamping of my law practice. This has given my entire team a feeling of confidence in our work product including the analysis and presentation to the client. This new focus on my law practice is invigorating. The legal market place has changed especially with marketing by "commodity providers" and other legal practitioners. Our new positioning in the legal market place has opened up many opportunities for my law practice.

What is your favorite LWP tool?
I have not implemented all of the tools that are provided by LWP. However, the tools we do use have resulted in a positive marketing message and enhanced creditability in my practice. The VA, AP, and Medicaid Intake Process and the resulting opinion letter are great marketing tools to persuade financial advisors as well as the clients themselves. Our use of these analysis forms give the client a unique blueprint plan for success and the steps that need to be done to get there.

How has being part of LWP impacted your team and your practice?
It will take time to implement all of these tools available from LWP. However, it has made our process flow more efficient, especially with marketing and workshops. The stories that we use in the workshops have been very well received and simplify something that may seem complex, into everyday terms. The coaching and list serves are very helpful in explaining the implementation of all of the tools. This has brought our team together with delegation of duties without additional hiring.brought our team together with delegation of duties without additional hiring.

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
October 19-21 Phoenix AZ

Tri-Annual Practice Enhancement Retreat
October 21-23 Phoenix AZ

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

DO YOU HAVE YOUR PURPOSE STORY DOWN?

Are you using the same tiresome biography to introduce your Workshop, Synergy Meetings, and Presentations. When they feel connected to you, they trust you more, and when they trust you more, they're more inclined to hire you. You've heard that old saying: "We do business with people we know, like and trust." Your Purpose Story will help you create the know, like and trust triad.

What you will take away from "Master Your Purpose Story" Training:

- The ability to instantly connect with any audience, anywhere, anytime
- The unstoppable combination of credibility and vulnerability - the trust factor
- The ability to be vulnerable with any audience without losing credibility
- A step-by-step structure to create your Purpose Story with ease
- You'll know exactly where to insert your Purpose Story in your presentations
- Your conversion rates will increase as a result of mastering your Purpose Story

The LIVE May 18th, 90 minute training workshop, "Master Your Purpose Story" has been uploaded to the LWP Website. If you need help locating this POWERFUL workshop email mhall@lawyerswithpurpose.com