

page 1

The NEW/ENHANCED
LWP Estate Planning
Process Binder

page 2

I Have No Clue What
She Does All Day
Monthly Member
Survey

page 3

Member of the Month
Andrew Jaloza

Upcoming Events

THE NEW/ENHANCED LWP ESTATE PLANNING PROCESS BINDER

Nedra Catale, CC&I Coach, Lawyers With Purpose

If you have not yet noticed, the entire LWP Estate Planning Process™ has been revised with new documents and support tools. Go to the LWP Processes Tab, click on the first tab (LWP Estate Planning Process), and check it out. The first folder – “Estate Planning Process Full Binder” – contains a single link that will enable you to print out 90% of the contents and should replace the 2012 binder you have been using. There are 229 pages of great stuff in there.

The Five Key Focusers™ have been updated to enable your firm to capture additional important information and are available to you in both Word and Excel formats.

The Workshop Outline has additional information about free publication for your workshops, and a detailed but concise follow-up process with supporting letters.

Check out the “Appendices” tab in particular as that contains updated and revised tools for your firm. The organization mirrors the process, so you can easily locate what tools you need for each step of the process.

For example, if you want to figure out what goes into a Vision Meeting™ folder, all the pieces are together, in presentation order. Simply click, insert your firm logo and print.

There are 18 letters that support the process, from workshop enrollment to file closing.

In Appendix “F” we have revised versions of the design templates that more closely mirror the design software.

In Appendix “G” we have included sets of inserts for your client estate planning binders that provide an overview of each document, plus additional client planning pieces such as Memorial Instructions.

In addition, videos and webinars that support each step of the process are in the process of being relocated so that members can more easily educate themselves on specific steps in the process.

As we continue to develop additional tools for our members, they will be search indexed, and added into the appropriate steps of the processes.

I HAVE NO CLUE WHAT SHE DOES ALL DAY

Molly L. Hall, Co-Founder, Lawyers with Purpose, LLC

How many of you have truthfully cried out, “I have no idea what she does all day” about your Director of First Impressions as you juggle client appointments, synergy meetings, internal meetings, document reviews and “emergency” calls with your teenage kids while on summer break? I personally hear this no fewer than 20 times a week from entrepreneurs across the map.

Such unfortunate hallway comments are not meant to be a criticism or judgment about the employee. The intent is not to imply that the employer believes she/he is messing around on Facebook all day. The truth of

the matter is that when a business owner has that feeling of “I don’t know what she does all day,” it is indicative of a business that is not operating with an organizational structure that relies on job descriptions with weekly tracking and accountability.

It’s actually because the business owner is behind closed doors all day in back-to-back meetings, painfully aware of the insane schedule, with little hope of addressing a growling stomach, an overloaded inbox and pressing family obligations.

If you have that sinking feeling about any of your team members, chances are it is not the person but a training and communication matter. Fortunately, this

is a very easy fix. And within 30 days you will know if it is actually a case of wrong person, wrong role and how to course-correct. Your CC & I coach can help you create a path and plan to review the employee’s

job description, the CC & I suggested 90-Day Training Plan and how to track and measure for weekly effectiveness, all in one hour. Together, you will also conduct a communication analysis to compare each person on your team’s Kolbe, Strength Finder and Languages of Appreciation to determine how to establish consistent, effective communication to ensure you never have that sinking feeling again.



So, if you’ve found yourself saying, “I have no clue what she does all day, contact ncatale@lawyerswithpurpose.com to schedule your LWP CC & I member call to support your communications efforts.



MONTHLY MEMBER SURVEY

What do you think? You’ll soon have a chance to let us know! In an effort to continually improve our services we rely on and value the feedback we receive from our members and thank you in advance for taking a couple of minutes to answer our brief survey. Completing the survey will put you in the running for an Amazon Gift Card, so be sure to keep an eye on your email for this month’s survey!



MEMBER OF THE MONTH

Andrew Jaloza

What is the greatest success you've had since joining LWP?

The two greatest successes I have had to date are 1) witnessing the dropping of the shoulders as my clients experience the peace of mind that knowing that I have educated them about and assisted in solving their estate planning dilemma, and 2) having a couple who are financial advisors tell me that the reason they have retained me is that they get the feeling that I really care about what I am doing. LWP has given me the tools to create a practice that is extremely gratifying.

What is your favorite LWP tool?

The legal/technical support of Aaron Miller and the coaching of my implementation coach Roz Drotar. As I have told them there is no way I could do this without them.

How has being part of LWP impacted your team and your practice?

The systematic approach and the support of LWP has enable myself and my team to create a successful estate planning practice in a very short period of time. The tools of LWP and my team, headed by my awesome right hand Deatra Austin have created a thriving Estate Planning Practice with Purpose in no time flat.

NOTABLE EVENTS

Weekly

Live ListServ
Every Monday-4:00 PM EDT

Bi-Weekly

Marketing Roundtable
2nd and 4th Fridays
12:00 Noon EDT

Monthly

Veterans Marketing Moments
3rd Wednesday-3:00 PM EDT
Veterans Back to Basic Training
3rd Thursday-3:00 PM EDT
Veterans Roll Call
3rd Thursday-4:00 PM EDT

Live Programs

Practice With Purpose
October 20-22 Phoenix, AZ
Tri-Annual Retreat
October 22-24 Phoenix, AZ

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

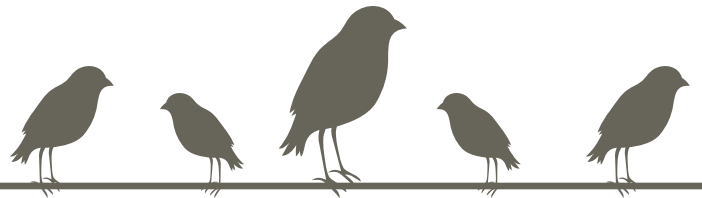




LAWYERS WITH PURPOSE

Legacy Building, Suite 202
555 French Road
New Hartford, NY 13413

EARLY BIRD PRIZE WINNERS!



Congratulations to the following firms for registering early for our Tri Annual Retreat and making the commitment early on to "Show Up!"

One Night Stay - Connie Aschenbrenner & Douglas Ocker

\$150 Airline Gift Card - Karlo Nebres & Susan Bulgawicz

\$150 Hotel Voucher - John Feller

Showing Up is about stepping out of your everyday world and stepping onto a plane, getting into a room with like-minded folks and taking the risk to close your firm for two and a half days when you have every reason in the world why you should not! Having faith that the very thing you need to get over the hump is waiting on the other end.

We'll see you in Phoenix!