LAWYERS WITH PURPOSE
MEMBER NEWS
WWW.LAWYERSWITHPURPOSE.COM
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WHY ATTEND TAPER?

IN THIS *issue*

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Your professional life revolves around providing legal services to your clients. Meanwhile, your team stands behind you to ensure every client's needs are met in a timely manner. You and your team work together like a well-oiled, highly-productive machine.

Or do you?

You may be meeting your clients' needs, but what about your needs and those of your team? How much time are you able to devote to getting new clients and growing your firm? When was the last time you took a three-week vacation? As for the members of your team, are they growing professionally and personally? Have you checked with them lately to see if they derive satisfaction from their work and are performing as efficiently as possible?

If not, you are hardly alone. Fortunately, we have some good news for you. The Lawyers With Purpose Twice Annual Practice Enhancement Retreat (also known as TAPER) is coming soon to Tampa, Florida. Attending TAPER can help you and your team grow together as a firm as well as personally. Over the course of two and half days, jam-packed with compelling, hands-on educational sessions, you'll learn the secrets to LWP's client-centered software and how to properly fund Trust Plans. Your team will learn how to present new client workshops on their own and gain an understanding of the vital roll they play in helping your firm grow. You and your team will also be able to work together to create monthly, quarterly, and annual goals so that everyone feels like their voice is heard and the work they do matters. TAPER gives you and your team the opportunity to stop, assess, and create solutions—all while sharing your experiences and insights with like-minded teams from around the country.

Sure, there are costs associated with attending TAPER and being out of the office for a few days. But TAPER is an investment that pays handsome returns in practice proficiency, efficiency and profit—not to mention personal growth. It will transform your practice, and perhaps, your life. We look forward to seeing you there!

UPCOMING *events*

TAPER
Twice-Annual Practice Enhancement Retreat
TAMPA, FLORIDA

February 19-23, 2018
Renaissance Tampa International Plaza Hotel

WHERE THE OCEAN MEETS THE SAND: Catch the New Wave in Practice Proficiency, Where Efficiency Becomes Profit

DECEMBER *Member* OF THE MONTH

ALAN *Hougum*

> **“BEING A PART OF LWP HAS ALLOWED EACH MEMBER OF OUR TEAM TO TAKE OWNERSHIP OF HIS OR HER PART IN THE PROCESS.”**

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

Our firm’s greatest success since joining LWP has been the ability to provide full-service estate planning and elder law services to clients, regardless of their facts or circumstances. We are not limited to certain types of solutions, hoping clients with exactly those needs happen to find us. In fact, one of the most rewarding aspects is that we’ve become a firm that receives referrals from other estate planning attorneys who aren’t equipped to handle the difficult fact patterns.

What is your favorite LWP tool?

Although each of us may have a fondness for different LWP tools, overall our favorite as a firm is the combination of the Design Template and CCS-drafting software. Those two work in tandem to allow us to synthesize a client’s preferences and convert those preferences into something that provides lasting value.

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

Being a part of LWP has allowed each member of our team to take ownership of his or her part in the process. It has been rewarding to see how much differently we operate than non-LWP estate planning firms, especially in how much emphasis LWP (and our firm) places on educating each client. That standard applies to every member of our team now in a way which is much more meaningful than it was before we found LWP.

Share something about yourself that most people don’t know about you.

I’ve always wanted to be either a cornerback for the Green Bay Packers or a radio DJ. Playing for the Pack didn’t work out, but I did two things to get closer to that second goal: 1) I currently host a live, local radio call-in show on estate planning about eight or ten times each year, which is a lot of fun; and, 2) for about a year during my law career I also moonlighted as a classic rock/hard rock DJ doing a weekly show on local radio under an assumed name, which was even more fun.

What is your favorite book and how did it impact your life?

It’s hard to narrow it down to only one book, but the best book I read in the last year was ***Misbehaving: The Making of Behavioral Economics***, by Richard Thaler. It was a really fascinating look at how human psychology meets economics, and how our personalities and other biases affect how we make money decisions. It didn’t hurt that the author was funny and that he won a Nobel Prize in Economics right after I bought the book. If you like fiction better, my personal favorites might be ***Without Remorse*** by Tom Clancy or ***Beach Music*** by Pat Conroy.

TRANSFORM YOUR PRACTICE AND GET CLE CREDITS

REGISTER NOW FOR TAPER TAMPA





TAPER Tampa will be a transformational experience. You'll learn to use the latest technology, systems and strategies to maximize your firm's operational efficiency and profitability. In short, you'll learn how to take your practice to the next level. (To see everything you'll learn at TAPER Tampa, visit **Retreat.lawyerswithpurpose.com**)

And, since **TAPER is now a twice-annual event, you won't be able to attend another one—or earn CLE credits in the process—until late October.**

TAPER TAMPA IS ONLY FOUR WEEKS AWAY.

Don't Miss it. Register Now!

TAPER

Twice-Annual Practice Enhancement Retreat

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MEET THE LAWYERS WITH PURPOSE TEAM

OUR LAWYERS WITH PURPOSE TEAM MEMBERS WERE ASKED TO TELL US HOW THEY SUPPORT OUR MEMBERS.

Dave Zumpano: My role in supporting members is to provide the vision for the company so that Lawyers With Purpose members can become successful at balancing their personal and professional lives. Building the system and process helped my firm run efficiently and I enjoy sharing that with members so they can achieve the same results. My wish is to enable every member to have an entrepreneurial practice that fulfills the attorney's goals.

Denise Hash: As Director of Operations, I am responsible for leading all aspects of the business which include, Finance, Sales, Marketing, Coaching and Implementation, Member Experience, Events and HR. I love what I do because I am able to touch all aspects of our business and interact with and impact all employees in the organization.

As Director of Operations I also have the opportunity to sit on the Executive Team. This is very exciting, because we as a team are always working on the business looking to make improvements to current processes and identifying new and exciting opportunities to bring to our membership.

I wouldn't want to be anywhere else doing anything different.

Amanda (Mandy) Bossow: As an Implementation Specialist, it is my pleasure to support our members in accurately implementing the Lawyers with Purpose best practices and procedures. It is my duty to help our members and their teams learn and understand how to utilize these processes, so they can become more efficient, not only with production, but with their time management. My ultimate goal and complete satisfaction is when a member expresses their true understanding of our systems and their focuser reports conclude they are well on their way to having a highly-efficient and profitable practice.

Matt Baechle: My primary responsibility is to educate attorneys how LWP's transformational systems and solutions for Estate Planning, Elder Law and Asset Protection can help them grow as entrepreneurs. I am passionate about helping attorneys understand why and how our solutions can uniquely enable them to transcend the limitations of typical firms within these practice areas as it relates to maximizing operational efficiencies, marketing, legal/technical knowledge and increasing firm profitability.

As a member of LWP Executive Team, I work closely with other internal departments and leadership on initiatives that enhance team synergy, brand awareness, program development and member value. And from a business development standpoint, I am also actively involved with identifying and cultivating strategic alliances/partnerships with third-party organizations that can provide incremental value to our members and company.

Ginger Cole: I am the Executive Assistant for Dave Zumpano and Denise Hash. I help with the administrative duties for Lawyers with Purpose and provide support to the team members in any way I can. I do a lot to support the members on the back-end, such as assisting with the preparation of the materials for the TAPER program.

Amanda L. Smith, Esq.: I serve as the Director of Education and Legal-Technical Attorney for Lawyers With Purpose (LWP). As a trainer for LWP's Practice With Purpose program, I educate members in the areas of Medicaid, Estate Planning, Elder Law, and Practice Proficiency. I provide ongoing, one-on-one legal-technical training to LWP's attorneys and team members, while continually developing quality legal education programs to enhance our members' legal competence and confidence in LWP's software, systems, and processes.

Christine Pandolf: I joined the LWP Team in September of 2017 as Marketing Manager and met many of you at TAPER DC in October. As this is a new industry for me, I've been learning from both the internal resources at LWP as well as the team in the "Lab". I have been truly touched by the success stories of members who have transformed their lives and practices due to the LWP organization. Another role is to market to and attract new members who become part of the LWP member community through which everyone can network and share experiences and strengths. As part of the LWP operations team I am also committed to assisting in the development of tools and the sharing of information which every member can access in order to continue to succeed.

Melanie Lopata: As Member Services Coordinator, I manage, track, and evaluate all membership enrollment activities including new member mailings, and give access to software, the website, and ListServs. It is also my responsibility to check in with our members so we can keep a pulse on what they are experiencing with our services. I want to make sure they are receiving top quality customer service.

Briana Moriarty: I love being able to help our members become successful by using our systems and processes. Working in the lab has given me insights on how the processes work and where members can tweak to make sure they are working for them. Member success is my number one goal and I am always excited to celebrate with them, however I am willing to roll up my sleeves and help members get past any challenges they face.

Phil Miner: I support members by reducing the learning curve as they learn to properly apply LWP Systems and Processes. I listen with compassion and spiritual commitment to help members develop a plan and a path to create more value, generate additional profits, and overcome roadblocks that prevent them from achieving the results they desire. In addition to developing the plan, I help them see the value and importance of planning and the impact it has on them being an intentional entrepreneur and a success.

I cover four key skill sets that all members need to use for effective communication, help them better understand what motivates them and others, and how to reduce conflict from miscommunication. I guide members in understanding how to use the LWP 5-Key Focusers to measure the progress toward their goals, identify blind spots, and understand how their numbers have a direct impact on the value of their business. My goal is to help members build the LWP foundation and develop the skills to take effective action to produce more hope, joy, and happiness in their practice and their lives.

Ryan Wegner: I am actively involved with troubleshooting and training members and team staff on how to use Actionstep and all its features. I instruct all members on how the LWP Workflows in Actionstep will make it easier on the attorney and team to effectively communicate and stay on task for their own clients.

MEET "THE LAB"

I'm sure you've heard the term "the lab" during coaching calls or while at TAPER events. We wanted to take a moment to introduce you to our innovative team at the Estate Planning Law Center (EPLC). EPLC's staff of 10, complimented with their hard work and diligence in "following the process" makes the perfect recipe for success. "The lab" is where ideas are created, implemented, tracked and tested before the programs are brought to LWP to share with members. EPLC is team centric and holds their mission true to heart, "our focus is family – providing peace of mind and keeping you in control when planning in advance or when crisis strikes."

Who is the lab? It is every team member at EPLC. Every person maintains their everyday role within the law firm, but is also responsible for special projects, which after being implemented, tested and tracked, are then presented to LWP.

The EPLC team will be at our upcoming TAPER in Tampa. They look forward to an informative week together with LWP members...along with some fun, while cruising around Tampa Bay on Thursday night.

Meet our team and why learn why they love what they do:

Jennifer McDonnell: I didn't always know I wanted to be an estate planning attorney. What I did know at the young age of 18, was that I wanted a fulfilling career that would challenge me mentally, allow me to help people, and would align with my future goal of having a family. As a partner at the Estate Planning Law Center, I strive to meet and exceed my clients' needs by helping families and loved ones navigate the legal process of creating an estate plan. I also assist with planning for special needs and helping families correctly supplement the goods and services available for Long Term Care through Medicaid Programs.

Elizabeth Evans: I am an attorney with EPLC. I handle estate planning, Medicaid qualification and post-death administration. I love what I do. The most rewarding part of my job is the peace of mind I am able to provide for the clients we help during all stages of their lives including preplanning, during a long term care crisis, and after the death of a loved one.

Brittney Shearin: I wasn't sure what I wanted to do when I first graduated law school, but after joining the EPLC team in June 2015, I realized I am right at home. Although this area of law can be confusing, I enjoy helping our clients navigate the estate planning process, because it is important for everyone to have some kind of plan.

Tim Crisafulli: Effective estate planning means the world to clients—it brings peace of mind and it helps ensure that the fruits of a lifetime of work are passed on safely and effectively. Some of my favorite aspects of the job are relieving clients of their anxieties, developing lasting relationships with them, and then seeing their planning efforts pay off. Estate planning is my ideal practice area because it combines the rigors of a complex area of law, with strong personal relationships.

Briana Moriarty: I love presenting the workshops because when my Poppie passed away he didn't have an estate plan and I watched my family struggle to try and figure it out. Presenting workshops provides me the opportunity to educate people on why it's so important to plan, so their families don't struggle to figure it out. They can just carry out the plan their loved ones created.

Picture left to right: **Christina Aiello, Kristina Martel, Brittney Shearin, Maria Dardano, Jennifer McDonnell, Elizabeth Evans, Kathleen Centolella, Shea Murray, Briana Moriarty.**

Missing from picture: **Dave Zumpano and Tim Crisafulli**

Maria Dardano: What I love most about my role in client services is the fact that I get to interact directly with each of our clients every day. I get to meet and get to know each and every one of them. My role allows me to ensure that they know I am only a phone call away and will do whatever I can to assist with any issue they may have.

Chrissy Aiello: I constantly joke that I live and breathe EPLC, but I wouldn't change a thing. We truly stand for our "all about family" motto. I love getting to know all of our clients from the first phone call, all the way through our social events. There is nothing more satisfying than knowing we change lives and put minds at ease through what we do every day. We are there for our clients and there for our staff, through it all. Our law firm is a family that extends to each and every client. I am truly grateful for all the clients near and far, who I am blessed to work with each day. Running the maintenance program and making it the best it can be is my ultimate goal for 2018.

Shea Murray: I do what I do here at EPLC because I get to help people in a time of need and our clients leave here with peace of mind. I love working here because we have such a compassionate environment and a great team here at EPLC!

Kristina Martel: Medicaid can be a very lengthy process and can get very frustrating for our clients and their family members. When we get involved, it helps give our clients more freedom to spend time with, and take care of, the ones they love. I do what I do to help our clients and their family members fulfill their loved ones needs. It is the most rewarding feeling when our clients' loved ones are able to get the care they need, without a worry in the world. Working with our attorneys and staff helps make this process even smoother. All of us at EPLC take great pride in maintaining that relationship with our clients for a lifetime. I love my job and wouldn't change any of it for the world.

TIPS and TRICKS | ARE YOU MEETING WEEKLY?

Team Meetings are the glue that holds the firm together. If you are a firm of two or more, it is beneficial that you set aside one hour a week to review what is happening in the firm. Team meetings give you a chance to do a pulse check on the business and perform accountability checks.

Team meetings set the tone for the upcoming week by providing updates on what can be expected. Reviewing what is upcoming gives everyone a sense of what to expect on Monday morning. You can setup a weekly team agenda to highlight these items under categories such as, Marketing, Client Issues, Relationship Management. In the group setting it allows for all team members to be on the same page and share thoughts and opinions.

Team meetings are also the prime time for reviewing reports with the team, as reporting is vital to the success of your firm. Reporting keeps the firm honest with measurable and trackable results. The five key focusers track projected revenue for the month (Cashflow Focuser), how well the attorney is doing at getting hired (Pipeline Results Focuser), how many appointments are scheduled for the upcoming week (Pipeline Focuser), the outcome and success rate of the firm's workshops (Workshop Results Focuser), and how many people reached out to your office for the first time (Initial Contact Focuser). Each of these reports holds each team member accountable for their piece in the Estate Planning puzzle.

Putting team meeting time on your calendars is just the first step. The most important piece to remember is you must attend them and not let work trump meeting time. One hour a week spent working ON the business will save you more time for working IN your business.

Wishing you success,

Briana Moriarty

Briana Moriarty
Member Services Manager

Send your SUCCESS STORIES

As an LWP member community we want to hear your success stories or something that you would like to share in the next edition of the LWP Newsletter.

Your peers can benefit from hearing what works for you - even if it's a sentence or two!

Send your success stories to memberservices@lawyerswithpurpose.com.