**PRACTICE42**
PREMIER PRACTICE INSTITUTE

# PROBATE PRACTICE TRACK ROADMAP©

## WELCOME TO YOUR ROADMAP

We are so excited you are here in our Group Coaching Program - Practice42's Premier Practice Institute.

In this section of our Membership Library, we will be working alongside you to support you as you build your Probate Practice. Do not hesitate to let us know your questions through our Premier Practice Institute Members Only Private Facebook Page and by participating in our Group Coaching Calls each month!

# PRACTICE42 ESTATE PLANNING TRACK ©

We always start the list of our Practice Track Resources, which you will use to create your law firm's Playbook, with a sample Workflows. Read the Workflow first, Resource Number 1, so that you can use it as a “Table of Contents” for all the included tools here. You can modify this timeline and customize these tools as you move forward, as well as use it to build out more than one Workflow for this Practice Area.

1 Probate Workflow for Full Administration with E-Filing

2 Initial Probate Telephone Call Checklist

3 Probate Questionnaire

4 Probate Conflict of Interest Search Form

5 Probate Retainer Agreement

6 Probate Document Checklist

7 Critical Case Deadlines for Probate Workflow

8 Sample Probate Case and Client Management Letters

Letter 1 > What To Expect From Us > Getting Started

Letter 2 > What To Expect From Us > Request for More Information

Letter 3 > What To Expect From Us > Professional Consent Letter

Letter 4 > What To Expect From Us > First Probate Update

Letter 5 > What To Expect From Us > Second Probate Update

9 Probate Specific Training and Education

Throughout this section of Practice42's Premier Practice Institute you will find more information on specific topics filled with information and training you need for this area! Be sure to jump to learn even more On Demand or participate in a Live Course!