PRACTICE42

PREMIER PRACTICE INSTITUTE

ESTATE PLANNING 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 Estate Planning 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 PLANNNG 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 30 Day Estate Planning Workflow

2 Initial Estate Planning Telephone Call Checklist

3 Estate Planning Questionnaire for a Single Person

4 Estate Planning Retainer Agreements

5 Client Homework and Acknowledgement Form

6 Estate Planning Funding Information and Checklist

7 Sample Estate Planning 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 > Family Consent Letter for Law Firm

Letter 4 > What To Expect From Us > Letter to Children and Decision Makers with No Documents

Letter 5 > What To Expect From Us > Letter to Children and Decision Makers with Documents

8 Estate Planning 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!