



RECESSION-PROOF YOUR PIPELINE

The secrets to selling
estate planning when
money is tight

About me



Leah Del Percio, Esq.

Founder and CEO,  trustate

- Settled **hundreds** of estates, nationwide.
- Administered over **\$50B** via estate administrations.
- **15+ years experience** as estate attorney (JD & LLM) with multi-jurisdictional estate/trust admin practice.
- Learn more: trustate.com



Introduction





How estate planning lawyers can close more business

Enhance high-touch engagement and automate back-end operations

- Sales should be high-touch, while service should be optimized for time and effort.
- Balancing high-touch engagement with operational efficiency is crucial.
- Modifying time allocation and automating backend tasks leads to more closed business.





Firstly...

How to get new clients through the door:

> At scale

- Source of new clients is referrals from existing clients, CPAs, wealth managers, etc..

> Early on

- Can't get solid referrals from these folks if you don't have any clients yet!





How to get new clients through the door

Marketing

- We can talk about **ads and sales**, but then we'd be like any other course.
 - One thing we will say: Early on, find an initial niche as you establish yourself. Use it and grow to new "niches" over time.
 - Finding your niche: Think long and hard about who your current ideal client is (i.e. your "ICP").
 - Examples: New parents, small business owners, executives at a local company, empty nesters, new retirees, caregivers, physicians, other attorneys, etc.





How to get new clients through the door

Cont'd

Marketing

➤ **Public relations** is an overlooked part of marketing for attorneys (but not PI attorneys or Biglaw!), AND it positions you as an expert.

- PR is cheap and easy. No need to hire an agency.
- Press Releases: PRnewswire, Businesswire, PRWeb
- Getting Quoted in Things: HARO





How to get new clients through the door

Cont'd

Sales

- As you establish your niche, use **creative strategies**.
- Reminder: Laypeople struggle to pay attention to estate planning until they need it.
- The trick: Find people **who are at the point where they know they need it** and pointing out that they need it.
 - When do they need it? Before, during and after a MILESTONE.
 - Estate Planning Gift Certificates: Wedding or baby registry gift
 - Sales tool for estate administration work





How to get new clients through the door

Cont'd

Sales

Milestones are bookends: **BEGINNINGS AND ENDINGS**

STARTING THINGS	Marriage	New Business
	Kids	Moving
	Divorce	Grandchildren
	New Job	Kid's Marriage

FINISHING THINGS	Caregiving to an elderly relative
	Death in the family
	Death of a parent
	Death of a sibling



Rules for an effective consultation

Meet the client where they are at.

- Spend the bulk of your attorney time on the client facing part .
 - CONSULTATION and planning meeting; delegate other stuff.
- Don't make a client jump through hoops or do HW to schedule time with you for planning or get you on a call.
 - For Admin you can ask for things up front, i.e., client HW.
- ★ **THEY DON'T CARE ABOUT YOUR PROCESS!**
 - Make it an afterthought for them.

Get to the emotion.

It always overrules because it's their truth and will help you better build their plan.

- More questions than answers
- Active listening



Reallocate High-Touch Time to Drive Conversions





The critical stages of client interaction

- Initial consultation
- Proposal and engagement
- Execution Meeting
- Scheduled Periodic Follow up Calls. Schedule these at execution meeting.





Ways to enhance high-touch engagement

➤ Personalized Consultations and Phone Sessions

- Shift from generic meetings to strategy-driven sessions.

➤ Storytelling and Education

- Make the value of estate planning tangible to clients through real-life examples.

➤ Check-in and Follow-Up Strategy

- Leverage personal touchpoints to prevent leads from going cold.





Structure sales calls and meetings for maximum conversion

- Use a **consultative approach** rather than an information dump.
- Ask the right discovery questions to highlight client pain points.
- Position solutions that resonate with the client's concerns.
- Handle objections by addressing emotional and financial barriers.
- Implement urgency triggers to prompt decision-making.





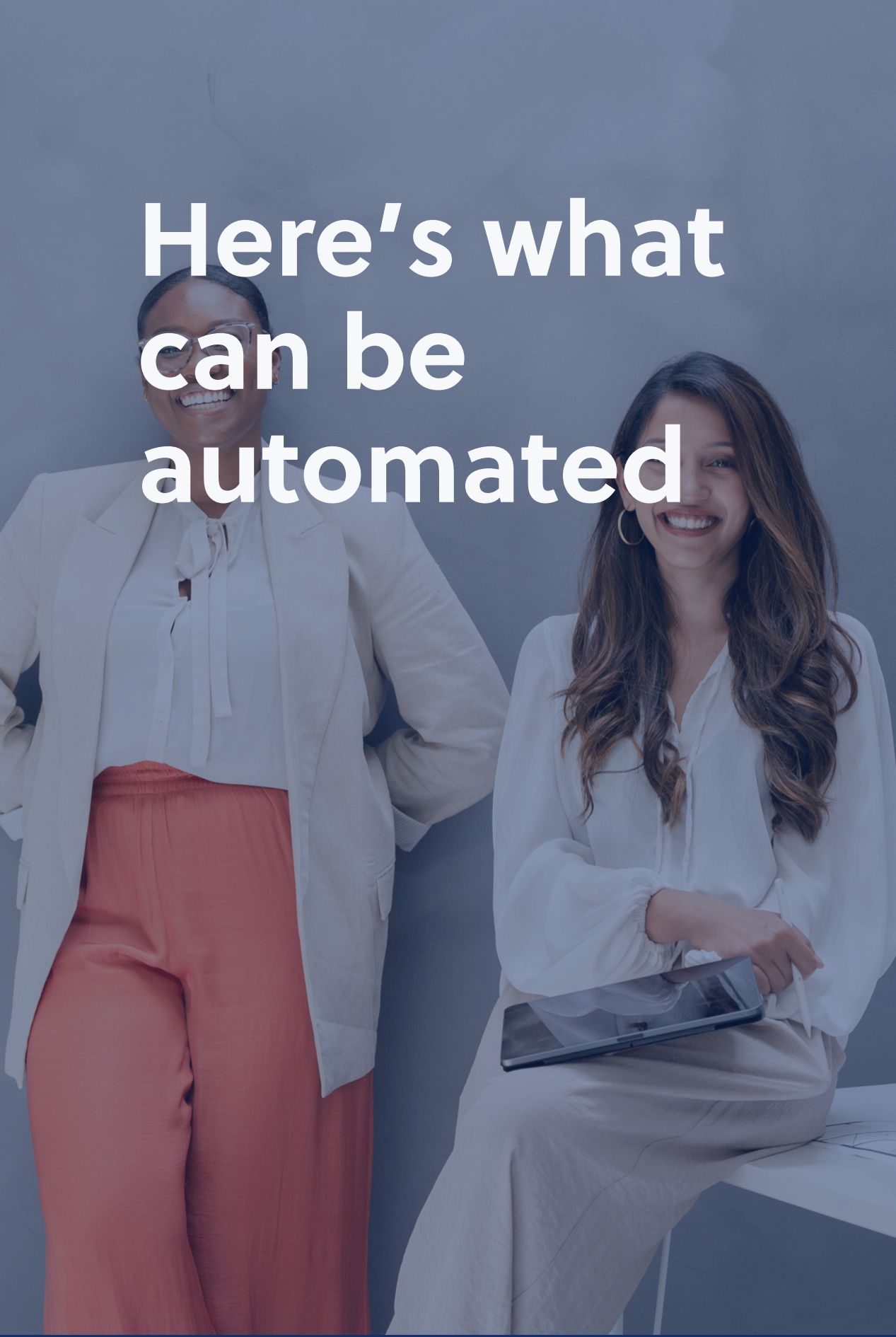
Leverage trust and referrals to increase close rates

- Establish credibility through **testimonials** and **case studies**.
- Create **referral programs** with existing clients and professional partners.



**After Closing, Automate the
Back-End to Free Up
More High-Touch Time**







Here's what can be automated

> **POST CONSULT Client Intake and Onboarding**

- Implement online intake forms with conditional logic.

> **Document Drafting and Workflow**


- Use estate planning software to generate documents instantly. 
- Set up automated review and approval workflows.
- Streamline client collaboration with secure portals. 

> **Follow-Up and Nurturing Sequences**

- Automate email sequences for prospects who don't engage immediately.
- Send reminders and deadline notifications through CRM systems.



After Closing, Automate the Back-End to Free Up More High-Touch Time



Here's what can be automated

Cont'd

> Billing and Payment Processing

- Offer automated payment plans to reduce friction.
- Set up recurring invoices and reminders for retainers.

> Post-Engagement Relationship Management

- Automate annual check-ins to encourage plan updates.
- Set up trust funding follow-ups through automated workflows.
- Definitely: Offer a planning / management workspace for the client that autoshares information with you
- Maybe? Offer subscription-based estate plan maintenance programs.



After Closing, Automate the Back-End to Free Up More High-Touch Time

**Get Referrals from Lifetime
Clients as their Trusted Lawyer**






Automate key touchpoints

Market existing clients.

- Amateur hour = law changes and holidays
- Seasoned pro = **MILESTONE MARKETING**

Trust Funding as a service

By using  trustate to offer trust funding services, the average law firm generates an additional \$36,000 in annual revenue. You can too.

Mendelsohn, Mendelsohn & Fry

Back to Admin Dashboard

You've completed 702 tasks with Trustate!

30 Actions Needed

James Jones

Trust Funding

2 tasks completed

Task	Status	Start Task	Point Person
<input type="checkbox"/> ASSIGNMENT OF TANGIBLE PROPERTY: Generate an assignment of tangible personal property to the trust. <small>Deadline: February 20th, 2025</small>	Not Started	Yes	James Jones
<input type="checkbox"/> ASSIGNMENT OF BUSINESS: Generate an assignment of a business interest to the trust.	Click to Review	Yes	+ Person
<input type="checkbox"/> OBTAIN DEED: Retrieve a prior deed for a property.	Not Started	Yes	+ Person
<input type="checkbox"/> DEED: Generate a deed to transfer property to the trust. <small>Note: Trustate only prepares deeds for no or nominal consideration.</small>	Click to Review	Yes	+ Person
<input checked="" type="checkbox"/> DEED TRANSFER TAX FORMS: Generate relevant tax forms associated with the deed to trust, if necessary.	Completed	Yes	+ Person
<input type="checkbox"/> GIFT TO TRUST: Prepare document for grantor to sign that evidences the gift of a specific property to the trust.	Not Started	Yes	+ Person
<input checked="" type="checkbox"/> EIN: Obtain Trust EIN. <small>As long as the Grantor is a trustee of the Trust, the trust may use his/her Social Security Number as its tax ID number, and skip this step. (Treas. Regs. Section 1.671-4(b))</small>	Signature Needed	Yes	+ Person
<input type="checkbox"/> OPEN TRUST ACCOUNT: Open trust checking account.	Not Started	Yes	+ Person
<input type="checkbox"/> TRANSFER BANK ACCOUNT: Retitle/transfer a bank account into the trust. (Capital One) <small>This task may require an in-person visit with the financial institution. In the event that an in-person visit is required, Trustate will prepare a customized packet for your client, and if needed, book an appointment with the institution.</small>	Click to Review	Yes	+ Person
<input type="checkbox"/> TRANSFER BANK ACCOUNT: Retitle/transfer a bank account into the trust. (BoFA) <small>This task may require an in-person visit with the financial institution. In the event that an in-person visit is required, Trustate will prepare a customized packet for your client, and if needed, book an appointment with the institution.</small>	Click to Review	Yes	+ Person
<input type="checkbox"/> TRANSFER BANK ACCOUNT: Retitle/transfer a bank account into the trust. <small>This task may require an in-person visit with the financial institution. In the event that an in-person visit is required, Trustate will prepare a customized packet for your client, and if needed, book an appointment with the institution.</small>	Not Started	Yes	+ Person
<input type="checkbox"/> TRANSFER INVESTMENT ACCOUNT: Retitle/transfer an investment account into the trust. <small>This task may require an in-person visit with the financial institution. In the event that an in-person visit is required, Trustate will prepare a customized packet for your client, and if needed, book an appointment with the institution.</small>	Click to Review	Yes	+ Person
<input type="checkbox"/> TRANSFER OWNERSHIP - LIFE INSURANCE: Obtain/complete life insurance "change of ownership" forms to transfer policy to trust as owner. <small>If this is an existing policy that has built up a cash surrender value or cash value, there are tax implications as the transfer of a policy will be either a gift, a sale, or part-gift and part-sale. If a gift or partial gift/sale, make sure to prepare an IRS Form 709 at tax time next year. If a sale, or partial gift/sale, make sure to have client execute appropriate sales documentation (i.e., an assignment and note) to memorialize the transaction, and for the trust to pay the grantor at FMV.</small>	Not Started	Yes	+ Person
<input type="checkbox"/> BENEFICIARY DESIGNATION - LIFE INSURANCE: Designate trust as beneficiary.	Not Started	Yes	+ Person



Testing and iterating

A/B test different automation tools for efficiency gains.

Refine follow-up strategies based on response rates.

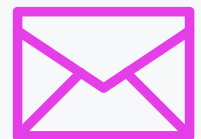
Resources



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