PLAN ON PROSPERITY

Personal & Practice Development Support for Estate Planning Attorneys

Personal & Practice Development for Estate Attorneys

Provided by InterActive Legal Systems in Alliance with Integrity Marketing Solutions

• Monthly Webinar Training • Online Self-Guided Study • Personal Behavioral Assessment •

• Multiple Practice Assessments • Moderated Subscribers' Discussion Forum •

A successful estate planning practice requires more than legal skill. In today's competitive environment, estate planners must focus on and commit to cultivating business management, marketing and client relations skills. When you enroll in the ***Plan on Prosperity*** support program you receive a full year of strategies, tools & training designed to build prosperity into your estate planning practice.

This unique 12-month program is available through an alliance partnership between InterActive Legal Systems and Integrity Marketing Solutions. The principals of both companies have a long history of mutual respect and support, which led naturally to this cooperative effort to assist clients in developing long-term prosperity as estate planners.

First-Year Program Includes

- **12 Monthly Webinar Training Sessions**
- **Online Self-Guided Study**
- **Personal Behavioral Assessment**
- **Multiple Practice Assessments**
- **Moderated Subscribers' Discussion Forum**
- **24/7 Access to Password-Protected Online Knowledge Base with Downloadable Worksheets, Charts, Templates & Samples**

Monthly Webinar Training Sessions

Each module is presented online first as a live, interactive webinar, then recorded and saved to the ***Plan on Prosperity*** website, where active members can view the session at their convenience. Additionally, you are invited to include others from your firm, whether staff or fellow attorneys, to attend and review the sessions. This makes the program especially cost-effective, eliminating travel costs, downtime in the office, and stretching your training dollars to cover your entire office with just one subscription. Webinar training sessions are accompanied by worksheets, samples and templates, also stored online for subscribers to review and download.

Each module is presented as a stand-alone session, so you may join the program at any time. Your 12-month subscription begins when you enroll and will "unlock" the current session and all future sessions as they are presented.

Practice Development Sessions (PD)
Practice Management Sessions (PM)

1. Best Practices in Trusts & Estates (PM) (or *How Not to Shoot Yourself in the Foot)* Learn from the successes, and failures, of your colleagues. In this session, we focus on the best (and worst) marketing, administration, technology and time-management systems for trusts & estates firms. Identify common problem areas and learn ways to resolve them.

2. Plan Your Approach (PD) To build a profitable trusts & estates practice you must learn to work *smarter*. Follow a case study on the design, implementation, tracking, analysis and modification of a strategic marketing plan for the trusts & estates practice. Topics to be covered include an overview of the marketing planning process, marketing background, and communication strategy.

3. Analyze This! (PM) This session will give you a better understanding of your practice, your market, and your future. Learn to organize your thoughts as well as collect and analyze crucial financial and market data. Learn how to implement essential financial tracking systems to guide your practice management decisions.

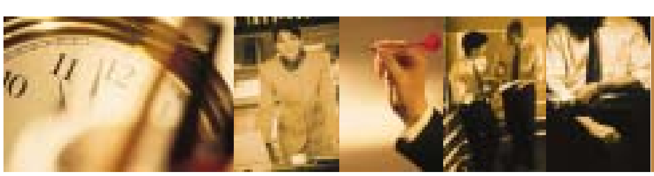
4. Know Yourself (PD) Expand your referral base, improve your closing ratios and boost your fee structure with effective interpersonal communication. We begin with an online assessment, using the DiSC® Personal Profile to help you understand your personal behavior style. Increase your effectiveness in a range of interpersonal situations and gain valuable insights into the behavior of others. Learn how to keep the focus on client needs and meet your revenue goals by developing competencies in a wide variety of consultative situations.

5. The Vision Thing: Defining a Vision to Drive Management Decisions (PM) Too often a law practice grows in mere reaction to market opportunities, financial pressure, etc. This "path of least resistance" leads to dissatisfaction, poor profitability, long hours and ultimate frustration. Take control of the practice development process by defining your vision and learn how to put it into action to create a satisfying, profitable and rewarding practice.

6. Branding Your Practice (PD) If you can build a powerful brand, you will have a powerful marketing program. In this session, you will learn about the power of a brand, the branding process, how to establish a firm brand, and how to communicate your brand.

7. Staffing (PM) Finding, hiring and retaining appropriate, qualified staff is one of the most challenging aspects of any business or professional office. In this session you will discover how other, similarly-situated firms staff their offices, what benefits and "amenities" are common. Also learn how to write a job description, advertise for and interview job applicants, protect your intellectual property and client confidentiality, and a hiring process you can use to help ensure your next new hire is a good fit for you and for the job you need done.

8. Fundamentals of Relationship Marketing (PD) Relationships are built with regular communication: personal contact, letters, newsletters, email, phone calls, etc. But keeping up with the dozens of referral relationships necessary to your practice could become a full-time job. Learn how to automate the process, ensuring that regular contacts are made in a timely and appropriate fashion, freeing you from time-consuming routine tasks and allowing you to invest your time wisely where it is truly needed.



9. Implement, Review & Evaluate (PM) If knowledge is power, then learning to track, report and analyze your practice's vital data is one of the most powerful steps you can take to build, nourish and protect your practice profitability. Learn what to track, how to track it, and what the numbers mean to make better decisions.

10. Building Professional Referrals (PD) Learn to identify potential referral sources, prioritize your marketing efforts, and begin the relationship-building process, including what to say in your letters, your public relations, your phone calls and your personal relationships.

11. Client & Case Management Protocols (PM) Improve the quality of your relationships with minimal effort. Automated systems relieve you of the drudgery, freeing you to concentrate on the more enjoyable (and profitable) aspects of your business and personal relationships. Learn how to manage contacts with clients, prospects and referral sources to build profitable relationships. Regardless which contact management program you use, learn the principles required to implement a cost-effective client acquisition and case management system.

12. Successful Client Relations (PD) Your clients can be the single best source of future business for your firm – but only if you nurture client relationships. A client relations program need not be costly, but it must be consistent. Identify the components of an effective client relations program and start implementing strategies to build strong relationships – and referrals.

About Integrity Marketing Solutions

Integrity Marketing Solutions is a marketing and practice development firm serving the trusts & estates attorney, consulting with trusts & estates firms on issues of practice management and development since 1995. The firm has a national perspective, with more than 200 client law firms in 49 states.

Kyle E. Krull, Esq., President, Legal Editor

An author, teacher and lecturer, Kyle has provided continuing education instruction to fellow attorneys, accountants and financial professionals at local, regional and national programs. He serves on the Editorial Review Board of the Journal of Financial Planning, having written for and been quoted in a variety of legal and financial publications. Kyle earned his bachelor's degree in journalism from the University of Kansas and his law degree from the Washburn School of Law. For more about Kyle visit www.kekpa.com.

Jennifer Campbell, Vice President & CEO

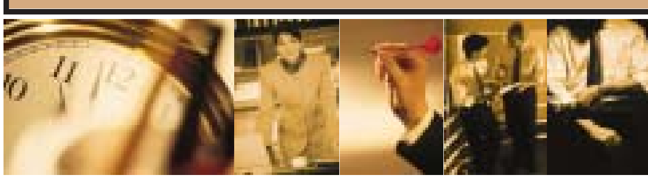
Jennifer has more than 25 years of experience marketing professional services. She earned a bachelor's degree in journalism from the University of Missouri-Columbia and is working toward her master's degree in marketing communications at the University of Kansas. She is the editor and pubisher of all Integrity Marketing Solutions publications and a frequent author and lecturer on the topics of marketing and practice management for the trusts & estates practice, and has spoken recently for the Southern California Tax & Estate Planning Forum and numerous state bar associations, including the Washington D.C. Bar Association. She has written for and been quoted in a number of professional journals, including *Trusts & Estates* magazine & *Lawyers Weekly USA.*

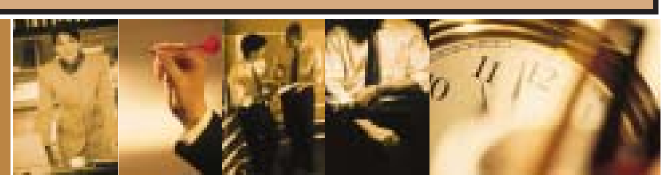
Building Prosperity

- **A Full Year of Strategies, Tools & Training to Build Prosperity into Your Estate Planning Practice**
- **Attend Monthly Live Webinars, Review Recorded Webinars Online 24 / 7**
- **One Price Includes Training & Support for Your Entire Firm**
- **Samples, Templates & Worksheets Available Online 24 / 7**
- **Ask Questions & Share Ideas with Moderated Discussion Forums**
- **WTP Subscribers Save $1,000**

Key Benefits

- **Analyze Your Practice & Establish Achievable Short & Long-Term Goals**
- **Expand & Nurture Your Referral Base**
- **Build Ongoing Revenue with Reliable Client Referrals**
- **Improve Your Time Efficiency: Regain Control of Your Practice ... and Your Life!**
- **Meet With More Qualified Prospects**
- **Enhance Your Fee Structure & the Total Profitability of Your Practice**
- **Boost the Return on Your Marketing Investment**





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Plan on Prosperity

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See Inside for Details!

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InterActive Legal Systems
c/o Integrity Marketing Solutions
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Overland Park, KS 66223

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