Implementation Guide for Lawyers

Ideal Clients:

- Usually 50 years of age+ with a valid Will, aging parents, recognizing their own mortality;
- Have named a family member(s) with minimal estate experience, as their executor;
- Or, find themselves named executor for a loved one, with no idea where to start.

Ideal Estate:

The dollar value of an estate is less important than the complexity of the estate, i.e. the number of people, assets, debts, legal documents, and service providers that the executor must deal with.

3 Ways to Deliver QE:

1. **Purchase an advisor license** for use with unlimited Wills clients. Engage your assistant to work with the client to gather data before drafting estate documents to give you a clear picture of who and what's involved. Review the data with the client, show them how the app works, and give them access to fill in missing information and keep their file updated.

    Have your assistant diarize to send the client an email each year to thank them for their business, including a reminder to keep their QuickEstate™ file updated, with a link to our   website: www.quickestate.ca.

2. **If you're short of time/capacity,** refer clients to www.quickestate.ca to purchase a single estate file license. Client populates their own file then gives you access to customize their estate documents and provide further legal advice.

3. **Do both:** purchase an advisor license for use with high value clients with complex estates or older clients who need help. Point clients with simpler estates to our website.

Advisor Success Kit

After signing up, you'll receive our **Advisor Success Kit**, that includes one on one coaching, useful articles for clients, Certified QuickEstate Advisor badges to install on your website and email signature template, social media graphics, and sample emails for clients.

Implementation: What works and what doesn't work?

Works: Properly explaining the value proposition and showing the client the Estate Executor Toolkit. This is the secret sauce to sell process. It shows the client how much work is involved to settle their estate, incentivizing them to get organized, consolidate and simplify.

Works: **Populate some of the client's data**, show it to them in the app and explain how it works before giving them access. If some of the data is pre-populated, the client's natural tendency is to fill in the blanks.

Doesn't work: Giving the client a blank estate file and not showing them how to use the app. They'll quickly feel overwhelmed and procrastinate. You'll chase them for months, the process will fizzle and no one wins.

Doesn't work: Trying to fill in every field. How much data you collect depends on how much time you have and what you need to render planning advice. Fill in the most important fields first and do the rest over time. If, after a couple of requests, the client won't produce a data point, move on and capture it in your next review.

Works: Charge for the service. How much depends on your regular hourly rate, complexity of the file and value of the client.

Doesn't work: Not charging. Clients who don't pay, will neither value the service nor engage in the process.

Works: Identify a short list of 2-5 clients to start. Invest a bit of time to **develop a repeatable sales process with efficient workflows** to deliver the service, refining as you go.

Doesn't work: **Offering QE on an ad hoc basis** with the odd client will not allow you to create efficiencies or drive new revenue.

Works: **Review the client's file** every 2 years to keep them engaged and collect more information to uncover new advisory opportunities. Because the QE data points don't change often, once a file is substantially populated, updating it takes no time.

WIN: Organized clients and their families get enduring peace of mind.
WIN: Lawyers cement relationships, get more referrals, higher fee revenue.