**Sales Script for Example Estate Planning Review Strategy Session**

Initial Team Member:

Hello, this is (name), how may I help you?

PNC:

“I need my Estate Plan reviewed…”

Initial Team Member:

[get initial information, phone number in case we get disconnected, full legal name]

Initial Team Member:

I would be happy to help you with that, our Client Intake director can help you.

Intake Team Member/Dragon:

**After understanding that the PNC would like their current EP reviewed, discover WHAT they are concerned about, WHY do they want it reviewed, WHAT changes they want. Most everyone is concerned about something – that is why they are calling us. Make sure you ask.**

Once you know what they are concerned about, explain our three different levels of Estate Planning Review Strategy Sessions to meet your needs…

1. Would it be alright if I went through our different options with you?
2. Start at the highest!
3. Our premium option… is called our “**Estate Plan Evaluation and Legacy Planning Assessment Strategy Session**”
   1. This option involves
      1. The complete review and analysis of your Estate Plan
      2. Assistance with collection of your information from your advisors.
      3. Preliminary strategy call with your Financial Advisor
      4. Review and analysis of your real property and financial assets to make sure they are properly structured in relation to your estate plan
      5. Estate Plan is specifically reviewed for its likely success to accomplish a successful wealth transfer as opposed to just its legal sufficiency
   2. Exclude cost until they decide which one they want.
4. Our intermediary option… is called our **Estate Plan Evaluation and Funding Strategy Session**
   1. Exclude cost until they decide which one they want.
   2. This package includes:
      1. Not only the Review and analysis of your Estate Plan but also includes…
      2. Review and analysis of your real property and financial assets to make sure they are properly structured in relation to your estate plan
5. Our basic option... is called our “**Estate Plan Evaluation Strategy Session**”
   1. Exclude cost until they decide which one they want.
   2. We will review and analyze your Estate Planning documents looking for legal issues, areas that will need to be updated, your concerns, and prepared recommended strategies for addressing all of this.
6. “Do you own a business?”
   1. Do you feel that your business is 100% up-to-date with all its minutes, Bylaws, and all the other corporate documents?
   2. Well good news, we offer corporate record review services as well. We discount this for you if this is done with your Strategy Session to make sure your business is in compliance.
   3. In the [middle] package, we will review your business ownership and whether your business is properly planned for in your Estate Plan
   4. In the [premium] package, we will not only review your business ownership status, but a preliminary review of all your corporate documents for compliance purposes.
7. “Which Package are you most interested in?”
8. Great, the cost for this is $\_\_\_\_\_, would you like to pay by credit card or check?
9. When our attorney is reviewing your Estate, he or she will be reviewing it for and providing you with specific strategies for how to address them.
   1. Do you have any other concerns that you would like your attorney to review your Estate Plan considering?
   2. Any changes that you know that you need addressed?
   3. Is there anything that you know is incorrect or wrong in your Estate Plan?
10. Our next steps are:
    1. We will email you \_\_\_\_\_
    2. We will email you \_\_\_\_\_
    3. We need you to drop off by [DATE]
       1. Your Estate Planning Binder (including all of the Estate Planning Documents outlined in your Engagement Agreement)
       2. Bank Account Statements, Financial Statements, Beneficiary Designations, Retirement and Pension Statements, and Investment Account Summaries
       3. Business Formation Documents (Minutes Book/folder)
       4. All Real Property Deeds (we will pull title for you if you cannot find these)
       5. By \_\_\_\_ date
       6. I’ll follow up with you on \_\_\_\_\_\_\_\_\_\_\_[day after they are supposed to drop off the docs/no less than 1 day before the time the attorney will be prepping the matter]
11. Do you have any questions for me?
12. Thank you for giving us the opportunity to discuss your concerns and matter with you. We look forward to talking with you on \_\_\_\_\_\_\_\_[strategy session date].