

## How to Create a Successful Will and Estate Planning Business

- Are you new to the Will and Estate Planning industry?
- Are you leaving a legal practice or Will Writing firm to be independent?
- Do you need to self-generate business for the first time?
- Are you looking for ways to increase your sales?
- Do you want to increase your visibility online?
- Are you growing your business and want training tools to help new consultants?

If the answer is **yes** to any of the above, this online video course is ideal to help you gain both confidence and practical skills to succeed in creating a successful wills and estate planning business.

Presented by Claudine Jackson LLB Hons TEP, each video gets straight to the point and is full of practical ideas that you can implement right away.

*“I’ve created this course based on my own experience of changing career, becoming self-employed and building a will writing business from scratch. If you are new to the will writing industry or want ideas to generate more business and better online presence, this course is for you.”*

Learn at a time that suits you. Each video is accompanied with a key-points guide for you to make notes and help you take action. From start to finish, in just over 80 minutes, you will be equipped with the information you need to create the foundations for a successful will and estate planning business.

### Course Overview

1. Structure & Stories: Getting the best results from client appointments  
Do a great job every single time by having a clear structure and using stories that will produce the best results for you and your clients.  
This section is split into two-parts.

#### Part 1

- The benefit of structure for you and your clients
- The power of a good preamble
- How to structure your appointment
- Questions to ask your client about family and finances

#### Part 2 – Structure and Stories

- Identifying wishes and concerns with clients
- The information needed from clients for will drafting
- Introducing trusts

- Talking about funerals
- Bringing Lasting Power of Attorney to life through real-life stories

(Duration: 26 mins)

2. Finding Customers – Building a Pipeline

Every business starts from zero. This video explains how you can build a will and estate planning business from scratch and the variety of you can generate new business. (Duration: 20 mins)

3. Building your Online Presence

A non-techy explanation on what you can do to improve your online presence and get results. Includes tips on website content, blogs and improving your google ranking. (Duration: 13 mins)

4. Getting Customer Reviews

Good reviews will get you business! This is a quick practical demonstration of how you can ask your clients for Google and Facebook reviews. (Duration: 4 mins.)

5. Networking

If you are new to business networking, this video will give you some tips on how to get started and build relationships with other professionals. (Duration: 11 mins)

6. Top Tips on using your Toolkit

Get the most out of The Estate Planner's Toolkit and hear how you can use this every day to save you time, increase your sales and enhance your brand. (Duration: 6 mins 30)

**Are you ready to get started?**

Simply purchase 'How to Create a Successful Wills & Estate Planning Business' from [www.estateplannerstoolkit.co.uk](http://www.estateplannerstoolkit.co.uk) and you will receive an email with your log on details. You can access the videos at anytime and learn at a time that suits you.

**Got a question?**

Please email [hello@estateplannerstoolkit.co.uk](mailto:hello@estateplannerstoolkit.co.uk) or call 0115 8461446

