<u>What will the advisor learn from this presentation?</u>

As Willie Sutton said when he was asked why he robbed banks, he said “Because that is where the money is.”

In this presentation financial advisors will learn how to use estate planning as a strategy to attract HNW clients, and not leave any money on the table and at the same time implement the estate planning process as an integral part of their comprehensive financial planning process.

<u>Presentation Overview</u>

One of the best ways to tap into the HNW market is through estate planning. But estate planning is so much more than death and taxes. It's about the emotions, the psychology, the family and, critically, the legacy.

In this workshop, Dan will cover the following: learning how to overcome client and prospect resistance to estate planning.

- mastering the *Disturb and Motivate* questions of estate planning.
- discovering how to implement the top-10 estate planning prospecting strategies.
- developing your estate planning webinar and seminar marketing strategy.
- mastering the "Estate Planning Process".
- gaining wealthier referrals and introductions.