NATIONAL NETWORK OF ESTATE PLANNING ATTORNEYS

Better Practices for Better Lives

You're an estate planner.
Is Your Practice Everything You Hoped it Would Be?
If not, maybe it's time for a change.

All of us start law school with a vision of what it means to be an attorney. We go in bright-eyed and optimistic with high ideals, big plans, and even bigger dreams. You may have decided to practice law so that you can make a good living financially. Or perhaps you started with altruistic motives and a desire to help people. For some of us, lawyering is a family tradition. However, it seems that most of us became lawyers to ***make a difference!***

Somewhere along the line, you discovered estate planning: an area of law that allows you to make that difference in the lives of clients and their families for generations to come. As you know, the estate planning legal practice provides more *freedom*.

- Freedom to choose your hours
- Freedom to choose your client base
- Freedom to choose your income level
- Freedom from adversarial relationships
- Freedom to be proactive instead of reactive
- Freedom from court dockets and judges
- Freedom to solve important family problems for your clients
- Freedom to pursue philanthropic goals
- Freedom to spend time with people you love
- Freedom to make a difference in the world

But maybe you're in a rut**.** Your estate planning practice has lost some of its appeal. Or you're not earning what you're worth. Or you feel like you're on a treadmill that is increasing in speed. You try to keep up with changes in the law. You search for new clients, build relationships with financial advisors for referrals, manage the business, pay the bills, train and manage employees, and even do some legal work along the way. Most days you are overwhelmed and underpaid.

Your practice is not your life. But it should serve your life. It should be something that provides the resources you need to accomplish your life's primary mission. For too many of us, our practice is just a job – a job that we own perhaps – but a job nonetheless. Our level of financial success depends almost entirely on our physical stamina!

> *"We have been members of the Network for 7 years. We cannot imagine the frustration and stress that an attorney would experience if he or she attempted to start an estate planning practice from scratch without the assistance of the Network. Our membership has been tremendously beneficial. The excellent legal education and unique collegiality of the National Network is like none other we have experienced. Keep up the good work!"*
>
> **Christopher W. Dumm & Markelle M. Dumm**
> Joplin, MO

There is a better way!
It's time to control your practice instead of the practice controlling you!

What if you could take back your life? What if you could be sure you're keeping current with changes in estate planning law – and are creating plans for your clients that will work – every time? What if you could work with clients that really appreciate what you do for them and recommend you to their family and friends? What if you could implement new processes and strategies that make your practice more efficient and provide you with more free time? What if you could get off the treadmill? What if you could make more money?

You can. And we can help.

The National Network of Estate Planning Attorneys is an organization of approximately 350 member firms that have found a better way to practice law.

Create plans that work for clients,
And in the *process*,
A practice that works for you!

It's all about the process! Not one particular process – but *your* process that *you* design! It's a process that begins with in-depth counseling. (We enjoy being called "Counselors at Law".) And the process follows the client throughout life, culminating with the successful transfer of wealth to the next generation – where the process begins again**. So how do you design a process that will help you earn more and give you more freedom? How do you provide plans that work and peace of mind for your clients?** It can be done with a little help from the National Network and our proprietary processes: the Three Step Strategy™ and Wealth Reception™.

Instead of being a brilliant legal technician who is "stuck" with running a business out of necessity, consider taking a new look at your practice – from the perspective of a businessman or woman who is also a lawyer! Work on your business proactively and purposefully instead of by default. Learn how to delegate anything that doesn't need to be done by a lawyer, and maximize your time with clients and referral sources – providing legal counsel and building relationships.

That's where the Practicum Transformation Program comes in!

Michael Gerber, the international best-selling author of *The E-Myth Revisited* writes about the benefit of working on your business instead of just in your business. We can teach you how to accomplish that and still get your work done! We want our members to be successful – enjoying the freedom of a prosperous estate planning practice – as quickly as possible.

The Practicum Transformation Program (PTP) has been designed specifically to help accomplish that. The PTP is an intensive six-month process that includes: weekly small group teleconferences, two six-day live training events called Practicum 1 and Practicum 2, and a two-day live event called the Legacy Builders Retreat. It is part of the training regimen for every new member, and only National Network members have access to it.

Now is the time to act.

In Practice *For* Yourself – Not *By* Yourself:

"The National Network has been an incredible source of technical education, business development strategies, and long term success philosophy. They are truly teaching and leading on the cutting edge; way ahead of the rest of the market place. They were instrumental in my transition from a hectic general practice into a well-organized specialized practice. I wish I had joined many years ago when I was just getting started."

Michael A. Dolan
Brighton, CO

"In my transition from a primarily litigation practice to an estate planning practice, I found the tools provided by the National Network of Estate Planning Attorneys to be invaluable. The quality of the education, the collegiality of the members, and opportunities for coaching and business development made the process much more comfortable than it otherwise would have been."

William F. Coyne, Jr.
Boston, MA

Features of the Practicum Transformation Program

1. 6 months of intensive attention to your firm - and the challenges you face.
2. Weekly teleconferences with your incoming class and the Practicum instructors – covering a broad range of legal issues and practice tips, and helping with real issues in your practice that come up week by week. Also allows for networking, exchanging ideas, and moral support.
3. The Practicum 1 live event which includes three days of foundational legal-technical training and three days on practice systems and processes.
4. The Practicum 2 live event which includes three days of advanced legal-technical training and three days on marketing and growing your practice. Practicum 2 also includes a speaker's school, and training in the Network's primary education program for clients and professional advisors: *The Truth About Estate Planning*™.
5. Help in preparing for your first live workshop for prospective clients and/or professional referral sources and a debriefing session to explore what worked and didn't work.
6. The Legacy Builder Retreat which includes two days of training on a wide variety of tools that we use to gather and preserve the non-financial wealth of the client: family values, stories, history, philanthropic goals, etc.

Unlike many of our education conferences and events, the Practicum Transformation Program is available to National Network members only.

Is your practice everything you hoped it would be when you started it? There's no reason to continue with a practice that is not fulfilling to you in every sense of the word. Decide to make some changes – to take control – to serve your clients better – to be rewarded financially. Don't just "get by" for another year. Take steps now to improve your practice and improve your life.

For more information, visit our website: www.nnepa.com OR contact Dan Stuenzi at 800-638-8681

Who Should Join the Practicum Transformation Program?

The PTP is designed for you if any of these things describe your practice:

- You are still fairly new to estate planning
- You are transitioning from a different practice focus
- You've been doing estate planning for some time, but aren't happy with your practice or your income
- You're spending too much time at work
- You're missing your kids' events
- There's never enough time to get everything done
- You feel overwhelmed
- You have frequent turnover in your office
- Your practice seems disorganized or even chaotic
- You hate to go to the office
- You constantly ask yourself, "Why am I doing this?"
- People you care about tell you you're always in a bad mood
- You think "marketing" is a bad word
- Clients or referral sources complain that things take too long
- You can't find things when you need them
- Your team members are inconsistent in client service

In each of these problems lies an opportunity. But if you continue to do the same things day in and day out, you can't expect different results.

Now Is the Time to Take Control of Your Practice and Make Decisions That Will Directly Impact Your Financial Future

The **Three Step Strategy™**, developed and refined exclusively by the National Network of Estate Planning Attorneys, teaches you how to provide a unique series of services to your clients to ensure that their plans work as they were intended. We will teach you to provide the highest levels of counseling, resulting in fees which may greatly exceed the going rate in your community. Clients will also happily pay an ongoing annual fee for continued support, maintenance, and updating. This provides an annuitized income stream to your law practice, reducing the need to constantly search for new clients to maintain consistent cash flow.

Wealth Reception™ describes our focus on the next generation – the receivers of the wealth. It includes the ability to pass on the true wealth of the client which includes much more than money. You'll be trained to help those clients who want to document and preserve family stories, family values, life lessons, philanthropic goals, and other non-financial assets.

"The National Network has been the best education in the law I ever experienced. One week of Practicum launched my estate planning practice way beyond what I ever dreamed it could be. The specialty workshops made me an expert in my community. Even better are the friendships that enable me to comfortably call others with problems and ask for their patient advice. And, I earned back all that I invested in the first two weeks after completing the Practicum courses."

Marvin J. Rudnitsky
Selinsgrove, PA

"Joining the NNEPA in 1997 has been absolutely the best thing I have done in my law career. It has given me the tools to develop my practice in a direction that I love, clients that I enjoy, and a wonderfully collegial relationship with other attorneys. The Network focuses not only on technically accurate and cutting edge education in a way that is practically relevant to my clients, it has also provided me with excellent tools for running and growing my practice."

Dagmar M. Pollex
Braintree, MA