To navigate this document, VIEW DOCUMENT MAP

# TABLE OF CONTENTS

[TABLE OF CONTENTS 1](#_Toc187660515)

[NOTE BEFORE BEGINNING 2](#_Toc187660516)

[INTRODUCTION 3](#_Toc187660517)

[GROUPS 4](#_Toc187660518)

[CUSTOM FIELDS 5](#_Toc187660519)

[**Set Up Tabs &** Custom **Headers** 6](#_Toc187660520)

[PRODUCTS 7](#_Toc187660521)

[IN THE BEGINNING… 8](#_Toc187660522)

[ADDING PARTNERED CONTACTS (particularly Client Records) 8](#_Toc187660523)

[CLIENT ATTRACTION 11](#_Toc187660524)

[WEB FORM: Initial Lead Intake 12](#_Toc187660525)

[WEB FORM: Event/Seminar Registration 18](#_Toc187660526)

[WEB FORM: Website Sign-Up For Information 18](#_Toc187660527)

[WEB FORM: Shocking Truth (Website Opt-In Success Page 18](#_Toc187660528)

[WEB FORM: Kid’s Protection Planning Guide 18](#_Toc187660529)

[WEB FORM: Mom’s Free Guide 18](#_Toc187660530)

[SALES FORM: Initial Prospect Intake (When someone makes appointment) 18](#_Toc187660531)

[WEB FORM: When An Initial Consultation is Cancelled 18](#_Toc187660532)

[WEB FORM: When a Lead is Referred to Another PFL 18](#_Toc187660533)

[WEB FORM: When Lead is Assigned to Another PFL 18](#_Toc187660534)

[CLIENT SERVICES / POST ENGAGEMENT 18](#_Toc187660535)

[Web Form: Post Engagement 18](#_Toc187660536)

[Web Form: 3-Year Review **Error! Bookmark not defined.**](#_Toc187660537)

[CLIENT RETENTION 18](#_Toc187660538)

[Family Wealth VIP Memberships 18](#_Toc187660539)

[SALES FORM: Family Wealth VIP Membership – Trust Plan 18](#_Toc187660540)

[NEW FORM **Error! Bookmark not defined.**](#_Toc187660541)

[PROFESSIONAL PLANNING PARTNERS 18](#_Toc187660542)

NOTES BEFORE BEGINNING

*COPYING INTO YOUR CRM FROM THIS DOCUMENT:*

Please use Notepad to paste your text from this document before copying into Infusion. As you know, Word documents have characters that need to be stripped out before pasting into any form on the web.

*DOCUMENT MAP*

In order to maximize your use of this document, please use the Document Map feature. This will allow easy navigation between sections.

To turn on this feature, click VIEW, click DOCUMENT MAP

*HYPERLINKS WITHIN THE DOCUMENT*

To save duplicating information and to make navigation as simple as possible, we’ve used hyperlinks that link to text within the document. For example, in setting up an appointment campaign for a web form, you might find that later on in the document, the appointment campaign is also used for another web form. Rather than having duplicate information, you’ll see a hyperlink to the information.

To use this hyperlink feature, view the document in *Reading Layout*. To do this, click VIEW, and choose READING LAYOUT.

*TIPS:*

When creating custom web forms and sales forms for INTERNAL USE ONLY, it makes it easy to track the actions if you copy the action secquences into the footer of the web form. You can see at a glance what the web form will perform.

INTRODUCTION

INTRODUCTION TEXT

Thank you for purchasing what could be one of the best investments you can make for your Estate Planning practice!

GROUPS

**CATEGORY:**

***LISTS***

*Tags:*

Client Mailing List

Prospect Mailing List

Referral Source Mailing List

Client Email List

Prospect Email List

Referral Source Email List

Do Not Send List

Newsletter Mailing List

Weekly Ezine

**CATEGORY:**

***Leads***

*Tags:*

YY/MM/DD Event Name Location

Irrevocable Trust

General Estate Planning

Elder Law

Kids Protection Planning

Business Planning

Litigation

Immigration

Divorce

Bankruptcy

[lawyers will add any practice areas they include here]

Kids Protection Planning Guide Requests

Moms Free Guide Requests

[add in additional lead generation sources]

KPP Started Process

KPP Named Guardians Need Doc Review

**CATEGORY:**

***Prospects***

*Tags:*

Made an Appointment with Name of Lawyer

Cancelled Appointment

Did Not Engage

**CATEGORY:**

***CLIENTS***

*Tags:*

Family Plan

Trust Plan   
Wealth Plan

Business Plan

LIFT Audit

[list out all types of client packages here]

**CATEGORY:**

***Members***

*Tags:*

Trust Plan

Life Plan

Business Plan

Legacy Plan

Client Not On Membership

**CATEGORY: *PROFESSIONAL PLANNING PARTNER***

*Tags:*

Professional Planning Partner

Professional Planning Partner Application

Real Estate Agent

Life Insurance

Financial Advisor

Mortgages

Divorce Lawyers Other

Lawyers Other

Referral Sources A+ (21+)

Referral Sources A (16-20)

Referral Sources B (11-15)

Referral Sources C (6-10)

Referral Sources D (1-5) Referrals

**CATEGORY: *MARKETING***

Media

Mom's Groups

Schools

Religious Groups

Seminar Locations

**No Category:**

Website Contact Us

CUSTOM FIELDS

Name Type

Attorney Text

Minor Children? Yes/No

Intake Notes Text Area

Own Home? Yes/No

Referral Name Text

Event Name Text

Feedback Text Area

Can Use Testimonial? Yes/No

Event Date Date

Leadsource: Advertisement Text

Other Leadsource Text

Engagement Date Date

Signing Date Date

Final Meeting Date Date

Initial Consultation Date Date

Init Consult Time Text

How Many Adults Text

How Many Children Text

Ages of Children Text

Best Way To Contact For Appt Dropdown: Email, Phone

Website Contact Us Email Body Text Area

VIP Membership Type Drop Down: Trust, Business, Life, Legacy

Business Category Text

Describe Client Type-Unique Service Text Area

PPP Received Logo? Yes/No

PPP Received Business Card? Yes/No

PPP Received Photo? Yes/No

Custom Note-EP Membership Email Text Area

Website Contact Us Email Body Text Area

Set Up Tabs & Custom Headers

* **TAB: CUSTOM FIELDS (INFUSION DEFAULT)**
  + Header: Leadsource
    - Fields:
      * Referral Name
      * Event Name
      * Feedback/Testimonial
      * Can Use Testimonial?
      * Event Date
      * Leadsource: Advertisement
      * Other Leadsource
      * Website Contact Us Email Body
  + Header: Memberships
    - Fields:
      * VIP Membership Type
  + Header: Client Engagement
    - Fields:
      * Engagement Date
      * Signing Date
      * Final Meeting Date
      * Initial Consultation Date
      * Init Consult Time
  + Header: PPP
    - Fields:
* Business Category
* Describe Client Type-Unique Service
* PPP Received Logo?
* PPP Received Business Card?
* PPP Received Photo?
* **TAB: CLIENT INTAKE**
  + Header: Intake
    - Fields:
* Attorney
* Minor Children?
* Notes
* Own Home?

PRODUCTS

To set up your products, click *ORDER*, choose *PRODUCTS*, then, choose *ADD PRODUCT*.

**NAME OF PRODUCT PRICE**

New Prospect Intake $0.00

(Used when a credit card is taken to be charged for no-show)

Kids Protection Planning Kit $397.00

*For whatever Estate Planning Packages you will offer, create them as shown in the examples below*

Estate Planning - $1,500 $1,500.00

Estate Planning - $2,000 $2,000.00

Family Plan -- $2,000

Trust Plan -- $4,000

Wealth Plan -- $6000

**NAME OF PRODUCT/CONTINUITY PROGRAM PRICE**

VIP Membership: Trust Plan $49.95

VIP Membership: Business Plan $99.00

VIP Membership: Life Plan $149.00

VIP Membership: Legacy Plan $249.00

IN THE BEGINNING…

ADDING PARTNERED CONTACTS (particularly Client Records)

Partnered contacts can be a challenge because you want to make sure you manage your database as efficiently as possible. Less duplicate records mean less money in postage and better perception of your office’s professionalism.

Adding a partnered contact with the same last name:

FIRST NAME: John & Mary

LAST NAME: Doe

Only add 1 contact record!

Adding a partnered contact with different last names:

FIRST NAME: John & Mary

LAST NAME: Doe / Smith (with Smith being Mary’s last name)

Sending Emails:

This is simple. However, it’s VERY IMPORTANT to remember when SENDING EMAILS: Always add from the merge fields the secondary email; that way, both partners will get an email addressed as: Hi, John & Mary,

Creating Mailing Lists:

Regarding mailing lists, with the few Contacts that you may have with different last names, just do a search in the csv export or the mailing labels file for “/” and fix it to read John Doe and Mary Smith.

If one is overlooked, the worst thing that would happen is that an envelope or the inside address would be: John & Mary Doe / Green. Not the best, but I’m sure this would be preferable than receiving multiple mailings.

“FOR INTERNAL USE ONLY”

A great way to manage tasks for your employees, check out the example at:

http://martinneely.com/tasks

This page is where Martin Neely employees go when they want to perform tasks and have the actions and emails done automatically without having to login to Infusion and performing them manually.

For example, if you have a seminar, you may have 20 “Purple Work Sheets” with prospect information that is ready to be entered into Infusion. Having a link on the /tasks page on your website will allow inputting the information more quickly and having actions run automatically.

You can also use this page to manage links to frequently accesses information to make it a snap for reference.

For example, if you have multiple toll free numbers that rotate in various campaigns, put a link to a page that has all these numbers listed, along with their current use. You can easily see what is available and what numbers are being used for what.

WEB FORM: Website Contact Us

This is a FANTASTIC way to ensure that all contacts are responded to. It is SPAM-PROOF and automatically adds the visitor to Infusion, along with their email. Be sure and reply from within Infusion so that the response is attached to their record. You’ll always know if a reply was sent and how it was handled.

To reply from within Infusion, just open the contact’s record, look under *Recent Email History*, click *VIEW* beside their email. This will open it and has a way to reply.

Fields

|  |  |  |  |
| --- | --- | --- | --- |
| |  | | --- | |  | | Optional | Required |
| |  | | --- | |  | | Optional | Required |
| |  | | --- | |  | | Optional | Required |
| |  | | --- | |  | | Optional | Required |
| |  | | --- | |  | | Optional | Required |

Note: Rename Website Contact Us Email Body field to: NOTE

Actions

|  |  |
| --- | --- |
| **Add/Remove From Group** | Add to 1 groups/categories: - Website Contact Us |

CLIENT ATTRACTION

WRITE INTRO HERE

WEB FORM: Initial Lead Intake

A lead is one who has made contact with your firm but has not made an appointment. Use this form when you have received a call, had a seminar or been given a referral. This is for internal use and has all the action sequences and campaigns listed to make sure you never have another lead “fall through the cracks.”

Fields

Create the web form with these contact fields, noting the required and optional choices:

|  |  |  |  |
| --- | --- | --- | --- |
| |  | | --- | |  | | Optional | Required |
| |  | | --- | |  | | Optional | Required |
| |  | | --- | |  | | Optional | Required |
| |  | | --- | |  | | Optional | Required |
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| |  | | --- | |  | | Optional | Required |
| |  | | --- | |  | | Optional | Required |

Add these custom fields

|  |  |  |  |
| --- | --- | --- | --- |
| |  | | --- | |  | | Optional | Required |
| |  | | --- | |  | | Optional | Required |
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| |  | | --- | |  | | Optional | Required |
| |  | | --- | |  | | Optional | Required |
| |  | | --- | |  | | Optional | Required |

Check Boxes & Associated Actions

Add these checkboxes with associated Action Sequences:

* *Wants Appt & FW Inventory & Assessment*
* Actions:
  + Send Email to CSD to call Prospect
  + Add to Appointment Campaign
* *Wants Article: Estate Plan*
* Actions:
  + Send Email w/Attached Article: Free Article Estate Plan
* *Wants Article: Government Scare*
* Actions:
  + Send Email w/Attached Article: Free Article Government Scare
* *Didn’t Make Appt At Event*
* Actions:
  + Add to Campaign: When Someone Doesn’t make an appt. at an event

Campaigns

New Prospect Campaign

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Status | Schedule |
| 1-Day Email to CSD To Call Prospect | Email | Active | Delay 1 Days |
| Task to Remind CSD To Call New Prospect | Task | Active | Delay 3 Days |
| 7-Day Email to CSD To Call Prospect | Email | Active | Delay 7 Days |

Appointment Campaign

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Status | Schedule |
| Send Appointment Made Packet | Fulfillment List | Active | Immediate |
| Set Up Tasks to Confirm Appt | Fulfillment List | Active | Immediate |
| Thank You For Making Your Appointment | Email | Active | Delay 0 Days |
| 5 Day Email to Prospect | Email | Active | Delay 5 Days |
| 5 Day Call to Appointment Made People | Fulfillment List | Active | Delay 5 Days |
| Send Reminder Postcard to Made Appt list | Fulfillment List | Active | Delay 14 Days |

When Someone Doesn Not Make an Appt at an Event

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Status | Schedule |
| Thank you email. | Email | Active | Immediate |
| 14 Day Seminar Follow Up Letter | Fulfillment List | Active | Delay 12 Days |

Action Sequences

These actions will always run:

* Create Lead Record
* Add to Group: Family Wealth Secrets weekly email subscribers
* Add to Groups: Newsletter Mailing List, EP Lead, Prospect Mailing List
* Set Contact Field “Contact Type” to LEAD
* Add to New Prospect Campaign

Templates

1-Day Email to CSD To Call Prospect

7-Day Email to CSD To Call Prospect

This is a follow-up reminder to follow up with a new prospect. Please call:

~Contact.FirstName~ ~Contact.LastName~

~Contact.Phone1~

~Contact.Phone2~

~Contact.Phone3~

~Contact.ContactNotes~

Task: Reminder to CDS To Call Prospect

~Contact.FirstName~ ~Contact.LastName~

~Contact.Phone1~

~Contact.Phone2~

~Contact.Phone3~

Email to Contact w/Attached Article: Free Article Estate Plan

Dear ~Contact.FirstName~,

Thank you for ordering the article, "Warning! Your Parents Estate Plan May Mean Trouble For You." Please find it attached.

We appreciate your Interest and ask that you let us know if there is anything we can do to protect your family to give the confidence and security you and they deserve.

To Your Wealth, Health & Happiness,

<Attorney’s Name>

Email to Contact: w/Attached Article: Free Article Government Scare

Dear ~Contact.FirstName~,

Thank you for requesting the article, "Keep The Government and Lawsuit-Happy Opportunists Away From Your Children's Inheritance."

We appreciate your interest and ask that you let us know if we can assist you in any way to make sure your family never pays unnecessarily for the protection and security you and they deserve.

To Your Wealth, Health & Happiness,

<Attorney’s Name>

Fulfilment Email to CSD: Send Appointment Made Packet

Follow these steps:

1. Put label on white linen folder

2. Put CSD biz card in white linen folder

3. On right side of folder put following documents starting from the back:

a. Appropriate EP worksheet for marital status

b. Customized Agenda

c. Customized Meeting Confirmation Letter.

4. On the left side of folder put following documents starting from the back:

a. Purple folder with customized label.

b. Directions to the office.

c. Fee schedule printed on color

d. Combined atty bio

e. Individual atty bio for atty who is meeting with client

f. Return envelope with postage

Put white folder in a USPS priority mailer and send.

Email to Contact: Thank You For Making Your Appointment

Hi ~Contact.FirstName~,

Congratulations on taking the first step towards the protection of your family and your wealth.

You've made a great decision to meet with a Martin Neely & Associates Personal Family

Lawyer. One your family with thank you for.

I'm the one who takes the calls from distressed family members after the death or incapacity

of a loved one and I always feel horrible for the family when no planning has been done because I know things will be so much worse. I'm glad to know it won't be that way for your family.

In a few days, you'll receive a USPS Priority Mail envelope from me with everything you'll need to prepare for your meeting.

Please open the envelope right away and begin completing the Estate Planning Worksheet. We'll need you to return this worksheet at one week prior to your meeting.

If you don't get the package or you need any help completing the worksheet, please just give me a call.

I'm here to help you and I welcome your calls! I'll give you a call before your meeting to check-in as well.

Warmest regards,

<Name of Client Services Director>

Email To Prospect: 5 Day Email To Prospect

Hi ~Contact.FirstName~,

It's Susan, the Martin Neely & Associates Client Services Director. I'm writing to make sure you received the packet I put in the mail to you the other day with important information

about your personal Family Protection and Wealth Preservation Consultation.

Please call me right away if you did not receive this packet, so I can get another one in the mail to you.

If you did receive it, great! Don't forget, we need the worksheet returned to us three days prior to your appointment with your Personal Family Lawyer.

Give me a call if you have any questions about how to complete the worksheet or anything else at all.

We look forward to serving your family.

Client Services Director

Fulfillment Email to CSD: 5 Day Call to Appointment Made People

Hi, this is \_\_\_\_, and I'm calling from \_\_\_ to make sure you received your pre-meeting Consultation package and remind you to complete the worksheet inside and return that to us at least three days prior to your consultation with your personal family lawyer on \_\_\_\_\_\_\_\_\_\_. (Make sure to state the date and time of the appointment.)

Send Reminder Postcard to Made Appt list (Fulfillment)

Check the appointment date and if it's more than 7 biz days away from today AND we haven't received the EPW, send a handwritten note card that says:

Hi <first name> and <first name>,

Just a quick note to say hello and remind you to return your estate planning worksheet to us before your meeting on [insert date at insert time].

If you have any questions, please call us.

Warmest regards,

<Name of Client Services Director>

Fulfillment Email to CSD: 14 Day Seminar Follow Up Letter

Send Letter Two to this List.

WAIT - MAKE SURE THAT NO PEOPLE ARE ON THIS LIST WHO HAVE ALREADY CALLED FOR AN APPOINTMENT.

Email to Contact: Thank You For Attending Seminar (Didn’t Make Appointment)

Dear ~Contact.FirstName~,

Thank you for spending time with me at the seminar just the other day. Your loved ones will thank you when you take action on what you discovered about making things easy for them if anything happens to you. Remember, probate and estate taxes are both voluntary! As things stand now, your family would have a mess on their hands if anything happened to you.

I know you are serious about protecting your family and your wealth. It's my mission to ensure you make the very best decisions throughout your lifetime and that your loved ones have a trusted team to turn to in a crisis situation.

You Family and Wealth Planning protection session certificate does expire soon; you can still meet with me when that happens, but it's going to cost you a bit more to do it. I'd love to see you keep that money in your pocket and ensure your family's protection at the same time.

Dedicated to Your Family's Wealth, Health and Happiness,

<Attorney Name>

PS - Don't miss your opportunity to save $750. Call <CSD> at <Your Office Number> to schedule your free, no-obligation personal meeting.

Minor Child Letter #2

Need to insert

14-Day Follow Up Letter

(NOTE: YOU CAN ALSO ADD YOUR PICTURE TO THE LEFT OF THE HEADERS)

**Warning: Your $750 Certificate**

**Is About to Expire.**

“There Are Only 3 Spots Left.

My Calendar is Almost Full.

Please read this now…”

<date>

Dear <first name>,

Thank you for spending time with me at the seminar just the other day. Your loved ones will thank you when you take action on what you discovered about making things easy for them if anything happens to you. Remember, probate and estate taxes are both voluntary! As things stand now, your family would have a mess on their hands if anything happened to you.

I know you are serious about protecting your family and your wealth. It's my mission to ensure you make the very best decisions throughout your lifetime and that your loved ones have a trusted team to turn to in a crisis situation.

To take advantage of the $750 Family and Wealth Planning protection session with Personal Family Lawyer at absolutely no charge, you’ve got to call Susan to get on the Personal Family Lawyer calendar for <month>. We only have 3 appointments left, so give <CSD> a call now while your thinking about it.

I would also like to offer a $250 gift towards your planning should you chose to plan with us. Remember, the Family and Wealth Planning protection session is completely free. You have nothing to lose and everything to gain. My offer will expire once all of our <month> appointments are full.

After your certificates expire, you can still meet with us, it’s just going to cost you a bit more to do it. I’d love to see you keep that money in your pocket and ensure your family’s protection at the same time.

Dedicated to Your Family’s Wealth, Health and Happiness,

<Attorney Signature>

PS - Don't miss your opportunity to save $1000. Call Susan at 310-697-0411 to schedule your free, no-obligation personal meeting with me before my 3 remaining appointments are full.

Success Page

Enter this text into the success page area and hyperlink the HERE back to your Lead Intake Form:

You're Done With This One!

Have another one to enter?

CLICK HERE

WEB FORM: Event/Seminar Registration

Fields

|  |  |  |  |
| --- | --- | --- | --- |
| |  | | --- | |  | | Optional | Required |
| |  | | --- | |  | | Optional | Required |
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| |  | | --- | |  | | Optional | Required |

ActionSequences

|  |  |
| --- | --- |
| **Add/Remove From Group** | Add to 2 groups/categories: - Family Wealth Secrets weekly email subscribers  -{Your event name & date Group Created when you schedule an event} |
| **Set Field Value** | Set Contact Type='Prospect' |
| **Add/Remove/Pause Campaign** | Add to 1 campaigns/categories:  - When someone RSVP's for an event |
| **Send Email** | Send Email:  - Thank You For Registering |

Campaigns

When someone RSVP's for an event

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Status | Schedule |
| Send Ticket to Attendee | Fulfillment List | Active | Immediate |

Templates

Send Ticket to Attendee (Fulfillment Email to CSD or Marketing)

Hi there,

The people on this list have registered for an upcoming event.

Please look in infusion to find out which date they registered for if you don't already know and send them the appropriate tickets.

Thanks,

<Attorney Name>

Thank You For Registering Email (SAMPLE)

Hi, ~Contact.FirstName~,

You're in! Your VIP registration is now confirmed for this exciting workshop, called , "7 Little-Known Steps You MUST Take, To Protect Your Minor Children".

Print This Page Right Now And Post It Near Your Calendar.

Be sure make a note of the details for this eye-opening breakthrough workshop; they are available at www.HelpMeAlexis.com, but don't hesitate to let us know if you need further assistance.

Note: You will also be receiving a few e-mails to remind you about the seminar. If you have any questions, please feel free to call my office and speak with Beverly prior to the workshop, at 310-697-0411.

Remember, every parent has a duty and obligation to protect their children, but... it's the GREAT parents who fulfill their obligation.

Your children are lucky, because you are a GREAT parent.

To Your Family's Wealth, Health and Happiness,

<Attorney Name>

Success Page

This is a sample success page to use as a guideline when someone registers for an event. It gives them a recap of all the information they need with instructions of what will happen and could look similar to this:

|  |
| --- |
| **PRINT THIS SHEET OUT NOW!**  **Thank you for signing up -- you made it in time and you’re in!**  “**Urgent News For Every Parent In The South Bay, Who Hasn't Gotten Around To Protecting Their Minor**  **Children (or Who is Unknowingly**  **Relying on a Plan That**  **Won't Work)!"**  Make a note of which event for which you registered:  10/14, 10am-11:30am, My Gym, 3511 PCH, Torrance  11/03, 10am-11:30am, Spectrum Club, 819 N Harbor Dr, Redondo Beach  Note: You will also be receiving a few e-mails to remind you about the seminar. If you have any questions, please feel free to call my office and speak with Beverly prior to the workshop, at 310-697-0411.  **Remember, every parent has a duty and obligation to protect their children, but... it’s the GREAT parents who fulfill their obligation.**  **Your children are lucky, because you are a GREAT parent.**  To your Family's Wealth, Health and Happiness,  <Attorney Name> |

WEB FORM: Website Sign-Up For Information

There are actually two web forms associated with this Home Page Opt-In as you will see on the success page. The first one (immediately below) asks your webpage visitors to leave their name and email address to subscribe to the Weekly Family Wealth Secrets Newsletter. Once a visitor submits information, the success page presents an offer for a free gift: The Shocking Truth CD.

A benefit to having a web form as a contact method is that it puts your visitors’ comments into Infusion automatically and NO SPAM!

Fields

|  |  |  |  |
| --- | --- | --- | --- |
| |  | | --- | |  | | Optional | Required |
| |  | | --- | |  | | Optional | Required |

Action Sequences

|  |  |
| --- | --- |
| **Add/Remove From Group** | Add to 4 groups/categories:  - Website Home Page Opt-Ins - Family Wealth Secrets weekly email subscribers - Combined E-Zine - MNA E-Zine - All Prospects |
| **Send Email** | Send "Website Home Page Opt-In Email" |

Templates

Email to Contact: Sample Home Page Opt-In Email

Hi ~Contact.FirstName~,

Thank you for requesting your FREE CD on the Shocking Truth which also gives you my FREE Family Wealth Secrets newsletter delivered to your door that will ensure you make the very best decisions for your family at every life stage. You are going to LOVE my weekly email. Here's what one of my subscribers had to say:

"Hi Alexis, Thank you for all of your emails that you have sent over the past couple of months. I enjoy reading your words of wisdom and tried advice. As well, I appreciate your willingness to help others recognize their true potential. You seem to be a bright entrepreneur with a good heart. Again, thank you for sharing your thoughts with all of your readers. Keep your emails coming!, Sincerely, Natasha"

Dedicated to Your Family's Well-Being,

<Attorney Name / Ph #>

Success Page

**THANK YOU!**

You have been subscribed.

We'd like to invite you to receive a free gift!

**"The Shocking Truth About Your Family Wealth**

**the Government (and Most Lawyers)**

**Doesn't Want You To Know!"**

Dear Friend,

My name is Alexis Martin Neely and I'm a lawyer in Los Angeles, California. More importantly, I'm just like you. As a mom of two kids and someone who loves my family very much, **I have the same concerns you do** about making sure my family would know just what to do if anything happened to me and not have to worry about making expensive and time-consuming mistakes.

**I'm offering this free CD so you can discover:**

* That **estate taxes are voluntary**, but your family WILL have to pay them if you don't take action...and I'll give you a simple plan you can put in place right away.
* Why **estate planning is NOT just for the wealthy**...and the **specific paperwork that every single American adult must have in place** to make life easier for their family if anything happens. If you have young adult children, you've got to hear this!
* If you've met with an estate planning lawyer and had documents prepared, **you might own the world's most expensive pile of paper**...and what you can do to fix it right away.
* How you can **guarantee that what you leave your kids is never lost** to their future ex-spouses or lawsuits against them...and how **you can protect what you inherit** from your parents!
* Why a Will is virtually worthless.
* How you can leave the people you love most **a gift that is far more valuable** than what's in your bank account...who you are, and what's important to you.

**Request Your Free CD and Discover**

**How To Protect Everything You Own**

**and Everyone You Love.  
  
(INSERT FORM HERE – SEE BELOW)**

**BONUS!**

When You Request Your Free CD,

You'll Be Automatically Registered For

My Free ***Family Weath Secrets Newsletter***

Delivered to Your Door so You'll Never

Miss A Single Secret

**My privacy pledge:** I will never sell, trade, rent, share, or otherwise divulge any information you've given me to anyone else. Not at anytime for any reason. That's my pledge to you, pure and simple.

WEB FORM: Shocking Truth (Website Opt-In Success Page

This form is used on the success page of the Website Opt-In form. If you use it as a standalone webform, don’t forget to add other action sequences that you’d want to run. For example, you’d want to add them to the Weekly Ezine and send them a welcome email.

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Action Sequences

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| --- | --- |
| **Add/Remove From Group** | Add to 2 groups/categories:  - Shocking Truth CD Request  - Family Wealth Secrets weekly email subscribers |
| **Add/Remove/Pause Campaign** | Add to 1 campaigns/categories:  - Shocking Truth CD Request - Fulfillment |
| **Send Email** | -Shocking Truth CD Request – Thank You For Ordering |

Campaigns

Shocking Truth CD Request – Fulfillment

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Status | Schedule |
| Fulfillment to Daniel | Fulfillment List | Active | Immediate |

Templates

Fulfillment Email to Fulfillment Person: Shocking Truth CD Request – Fulfillment

SUBJECT: Shocking Truth CD Request From <Your Firm Name>

Please mail a "Shocking Truth" CD to this person.

Thanks!

CSD

Email to Contact: Shocking Truth CD Request – Thank You For Ordering

Hi ~Contact.FirstName~,

Thank you for requesting your FREE CD on the Shocking Truth

which also gives you my FREE Family Wealth Secrets newsletter

delivered to your door that will ensure you make the very best

decisions for your family at every life stage.

You should receive your CD within a few days, but let us know

if, for some reason, it was not delivered.

Dedicated to Your Family's Well-Being,

<Attorney Name>

<Phone #>

Success Page

Thank you for requesting your Free CD on the

Shocking Truth About Your Family Wealth

the Government (and Most Lawyers!) Don't Want You to Know.

Please watch for it in the mail.

|  |  |
| --- | --- |
| Dedicated to Your Wealth, Health and Happiness,    YOUR SIGNATURE IMAGE EXAMPLE:  Alexis Neely  Family Wealth Planning Institute  Personal Family Lawyers™  1-866-999-FWPI  [www.FamilyWealthMatters.com](http://www.FamilyWealthMatters.com)  [www.FamilyWealthSecrets.com](http://www.FamilyWealthsecrets.com) | YOUR PICTURE HERE |

WEB FORM: Kid’s Protection Planning Guide

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Action Sequences

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| **Add/Remove From Group** | Add to 4 groups/categories:  - Kids Protection Planning Guide Requests - E-Zine - All Prospects - Newsletter Mailing List - Family Wealth Secrets weekly email subscribers |
| **Add/Remove/Pause Campaign** | Add to 1 campaigns/categories:  - When Someone Requests a KPPG |
| **Send Email** | Send “Thank You For Ordering the KPPG” |
| **Set Field Value** | Set Contact Type='Prospect' |

Campaigns

When Someone Requests a KPPG

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Status | Schedule |
| Mail KPPG | Fulfillment List | Active | Immediate |
| 7 Days Email for KPPG | Email | Active | Delay 7 Days |
| 9 Day Phone Call | Fulfillment List | Active | Delay 9 Days |
| 14 Day Letter for KPPG | Fulfillment List | Active | Delay 14 Days |
| 30 Day Phone Call | Fulfillment List | Active | Delay 30 Days |

Templates

Email to Contact: Thank You For Ordering the KPPG

Hi ~Contact.FirstName~,

Thank you for requesting your free Kids Protection Plan Guide.

Watch for it in the mail! Your order will be shipped within 72 hours.

To your Family's Wealth, Health and Happiness,

<Attorney Name & Phone #>

Email to Contact: 7 Day Email For KPPG

Hi ~Contact.FirstName~,

I just wanted to check in to make sure you received your

free Kids Protection Planning Guide.

If you did not get your Guide, please call me right away

and I will personally put it in the mail for you.

Of course, if you have any questions, we are here to help

you. Give us a call at <your number>.

To Your Family's Wealth, Health,& Happiness,

<Attorney>

14 Day Letter for KPPG

WAITING TO INSERT

Fulfillment Email to CSD: 9 Day Phone Call – Script

CREATE FULFILLMENT EMAIL WITH SCRIPT IN BODY

Fulfillment Email to CSD: 30 Day Phone Call Script

CREATE FULFILLMENT EMAIL WITH SCRIPT IN BODY

Success Page

Thank you!

Your request has been received and will be

processed within 72 hours.

We appreciate your interest and look forward to hearing

that you've received your requested information.

Please don't hesitate to contact us if you have

any questions or we can assist you in any way.

<put email link in “contact us” text>

WEB FORM: Mom’s Free Guide

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Action Sequences

|  |  |
| --- | --- |
| **Add/Remove From Group** | Add to 3 groups/categories:  - Family Wealth Secrets weekly email subscribers - Newsletter Mailing List  - Mom's Free Guide Request |
| **Send Email** | Send "Mom's Free Guide Thank you Email" |
| **Add/Remove From Campaign** | Add to 1 campaigns/categories:  - Mom’s Free Guide Requests |

Campaigns

Mom’s Free Guide Requests

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Status | Schedule |
| Mail Mom’s Free Guide | Fulfillment List | Active | Immediate |
| 7 Days Email for Mom’s Free Guide | Email | Active | Delay 7 Days |
| 9 Day Phone Call | Fulfillment List | Active | Delay 9 Days |
| 14 Day Letter for Mom’s Free Guide | Fulfillment List | Active | Delay 14 Days |
| 30 Day Phone Call | Fulfillment List | Active | Delay 30 Days |

Templates

Email to Contact: Mom's Free Guide Thank You For Ordering

Hi ~Contact.FirstName~,

Thank you for requesting your "Mom's F.ree Guide."

Inside, you'll learn:

\* How to Take Charge of Your Finances In Case Something Happens to Your Partner

\* 7 Steps to Know Your Children Are Taken Care of Should the Unthinkable Happen to You

\* What to Leave Behind For Your Children That's Much More Important Than Money and is Most Often Lost

\* How to Guarantee You Are Not Left in Near Poverty in Your 80s Like My Grandmother Was! (It Might Seem Far Off, But Financially, It's Right Around the Corner.)

Your F.REE guide will be rushed to you by First Class Mail within the next 48 hours.

If you don't receive it or if you have any questions, please feel f.ree to call me at <Your Phone Number>.

To Your Family's Wealth, Health, & Happiness,

<Attorney Name>

7 Day Email for Mom’s Free Guide

Need to complete

14 Day Letter for Mom’s Free Guide

Need to complete

Scripts for 9 Day & 30 Day Call

Need to complete

Success Page

Thank you for requesting your

Mom's Free Guide!

Your request will receive immediate attention, so

be on the lookout for it in the mail soon!

To Your Wealth, Health & Happiness!

<Attorney’s Name>

SALES FORM: Initial Prospect Intake (When someone makes appointment)

This form is FANTASTIC! It will manage all the actions you want to happen when someone makes an appointment: It will send them a welcome email with what to expect next, it will notify the managing attorney of the appointment, it adds them to groups, and schedules follow-ups. Use this form for your employees to input information when someone makes an appointment. This uses the Product, New Prospect Intake, because you’ll want to get a credit card to guarantee the appointment. If for some reason, you choose not to get a credit card number, you can use this test VISA card number to process the order and no card will be charged: 4111111111111111 (use any expiration date).

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Action Sequences

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| --- | --- |
| **Add/Remove From Group** | Add to 4 groups/categories:  - Firm E-Newsletter  - Firm Newsletter Mailing List  - Appointments Made |
| **Create Lead** | Create a lead record for the contact |
| **Set Field Value** | Set Contact Type='Prospect' |
| **Chain Action Sequence** | Run "When Someone Makes an Appointment": |
| CONDITION: will run when '<Managing Attorney’s Name>' is true: NOTE: Add one of these for each attorney. | |
| **Send Email** | Send "<Managing Attorney’s Name>: Init Consult Confirmation" |

Chain Action Sequence: “When Someone Makes an Appointment”:

|  |  |
| --- | --- |
| **Add/Remove/Pause Campaign** | Remove from 4 campaigns/categories:  - When Someone Requests Moms Free Guide - When Someone Requests KPP - Lost Leads - When Someone Doesn’t make an appt. at an event |
| **Add/Remove/Pause Campaign** | Add to 1 campaigns/categories:  - Appointment Campaign |
| **Add/Remove From Group** | Add to 3 groups/categories:  - Weekly E-Zine - Estate Planning Appointments |

Campaigns

Lost Leads

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Status | Schedule |
| Send letter #3 to Lost Leads | Fulfillment List | Active | Calendar: 1/5/2007 |
| Final Call to Lost Leads | Fulfillment List | Active | Calendar: 1/10/2007 |
| Call #2 | Fulfillment List | Active | Calendar: 1/2/2007 |

CREATE INTERNAL LINKS FOR BELOW CAMPAIGNS

[Appointment Campaign](#_Appointment_Campaign)

When Someone Requests Moms Free Guide

When Someone Requests KPP

When Someone Doesn’t make an appt. at an event

Templates

Email to Managing Attorney (copy senior attorney): Init Consult Confirmation

Please note that the following client has scheduled an upcoming initial consultation:

~Contact.FirstName~~Contact.\_SpouseAND~~Contact.SpouseName~ ~Contact.LastName~

~Contact.\_InitialConsultationDate0~ at ~Contact.\_InitConsultTime~

<CSD>

Success Page

Enter this text into the success page area and you can also insert a link to close window.

You're Done With This One!

<form>

<input type=button value="Close Window" onClick="javascript:window.close();">

</form>

WEB FORM: When An Initial Consultation is Cancelled

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Action Sequences

|  |  |  |
| --- | --- | --- |
| **Add/Remove From Group** | | Add to 1 groups/categories:  - MNA Cancelled Appointment |
| **Set Field Value** | | Set Contact Type='Lead' |
| **Add/Remove/Pause Campaign** | | Add to 1 campaigns/categories:  - Lost Leads |
| CONDITION: will run when '<Managing Attorney’s Name>' is true | | |
| **Send Email** | Send "MNA: <Managing Attorney’s Name> Appointment Cancelled" | |

Campaigns

Lost Leads

Templates

<Managing Attorney’s Name> Appointment Cancelled

Your initial consultation has cancelled as indicated below:

~Contact.FirstName~ ~Contact.LastName~

~Contact.\_InitialConsultationDate0~ at ~Contact.\_InitConsultTime~

Success Page

This appointment has been cancelled,

and the managing attorney sent a confirmation email.

CLIENT SERVICES / POST ENGAGEMENT

WEB FORM: Post Engagement

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Action Sequences

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| --- | --- |
| **Send Email** | Send "Firm Intro Email Post-Engagement #1 from CSD" |
| **Send Email** | Send " Immediate Email Upon Engagement" |
| **Add/Remove From Group** | Remove from 2 groups/categories:  - Prospects  - Client Mailing Labels |
| **Add/Remove From Group** | Add to 2 groups/categories:  - MNA Client Ind Records  - Family Wealth Secrets weekly email subscribers |
| **Add/Remove/Pause Campaign** | Add to 1 campaigns/categories:  - Estate Planning Client: |

Campaigns

Estate Planning Client

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Status | Schedule |
| New Client Update Infusion | Fulfillment List | Active | Immediate |
| Drafting Coordinator Introduction | Email | Active | Delay 4 Days |
| Funding Coordinator Introduction | Email | Active | Delay 7 Days |
| Client Services Specialist Introduction | Email | Active | Delay 14 Days |

Templates

Email to Contact: Firm Intro Email Post-Engagement #1 from CSD

Hi ~Contact.FirstName~,

I wanted to take a quick minute to introduce you to our warm and caring team so that you know who is working behind the scenes to take care of your family during the planning process and beyond.

Expect to get a personal introduction email from each member of our team over the coming weeks. In the meantime, here's a brief overview.

First of all, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ is our Plan Coordinator. If we are missing any information or need any clarification during the drafting phase of your planning, you will probably get a call or an email from her. Your timely response to her requests will greatly help make your planning as smooth as possible.

\_\_\_\_\_\_\_\_\_\_ has the most challenging job in our office. As Funding Coordinator, \_\_\_\_\_\_ is hard at work preparing your asset spreadsheet. Your asset spreadsheet is critical because it allows us to confirm the assets you own, ensure those assets get moved into your living trust and make sure your loved ones will know what to look for if anything happens to you.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_ is our Client Services Specialist, and she'll be available as a second support to you during the planning stage. If, for any reason, you can't reach me, she'll be your primary contact for all post-planning needs, such as corporate formation or records updating, a death in the family, or the maintenance of a life insurance trust.

If you need anything at all or you aren't sure who to call, I'm the Client Services Director here and I welcome your phone calls or emails with any questions, comments, or concerns. I'm in the office \_\_\_\_\_\_(HOURS)\_\_\_\_.

I look forward to seeing you at your signing ceremony.

To your Family's Health, Wealth, and Happiness,

<CSD Name, Firm Address & Phone Number

Email to Contact: Immediate Email Upon Engagement

Hi ~Contact.FirstName~,

I just wanted to send you a short note to say thank you for choosing Martin Neely & Associates to take care of you and your family.

I know you have a choice of many lawyers and law firms you can work with and I also know that you made absolutely the best choice for the protection of your family.

You can be assured this is the beginning of a lifetime relationship that will give you the peace of mind of knowing you are making the best legal decisions throughout your life and that your family will be well taken care of when you are no longer here.

You'll be getting my weekly email every week and our monthly newsletter each month.

And, if you've enrolled in one of our membership programs, you'll also be getting our CD of the month and loads of other benefits I know you'll appreciate. Benefits such as online access to your important legal documents, special member only events, and ongoing legal guidance without paying additional fees.

In the meantime, we are hard at work on your estate plan and look forward to seeing you back in our office to sign your critical planning documents.

If you have any questions, just call us.

Much love to you,

<Attorney Name>

Email to Contact: Drafting Coordinator Introduction Email

Hi ~Contact.FirstName~,

My name is \_\_\_\_\_\_\_\_\_\_ and I'm the Plan Coordinator here at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. I am responsible for making sure that all of your documents accurately reflect the plan you've designed with your Personal Family Lawyer.

It is my job is to attend to all the little details of your plan documents in order to make sure your plan is ready to sign when you come in on the date of your signing ceremony and that your plan will work for your family.

And while our focus here at \_\_\_\_\_\_\_\_\_\_\_\_\_\_ goes way beyond just making sure you have a great set of documents, your plan documents are the foundation we have to have in place to be able to care for your family when you can't.

You'll be hearing from \_\_\_\_\_\_\_\_\_\_\_\_ over the next couple of weeks if I am missing any information I need to prepare your plan documents.

If you don't hear from one of them, you can assume I have everything I need and you'll receive a letter with the names of everyone you've chosen to act in various roles about 10 days from now.

When you receive that letter, please open it, review it and call \_\_\_\_\_\_\_\_\_\_\_ at \_\_\_\_\_\_\_\_\_\_\_\_\_ or email them as soon as possible with

any changes or corrections so we can ensure your documents are all ready for your signing ceremony.

Warmest regards,

<Name, Firm Address & Phone #

Funding Coordinator Introduction Email

Dear ~Contact.FirstName~,

As Funding Coordinator for \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, I just wanted to drop you a note to let you know what to expect over the next few weeks with respect to the funding process (transfer of assets) for your new Trust.

Step #1: Asset Identification

As you know, you have already been asked to provide copies of statements to identify all of your assets (such as real property and timeshares; non-retirement assets such as businesses, stocks, and banking, brokerage and custodial accounts; insurance policies; and retirement assets such as IRAs, 401Ks, and other employment retirement plans).

This information is not only useful in the design phase of your Estate Plan, but it is also necessary to ensure your assets are properly "funded to" (owned by) your Trust to avoid the nightmare of probate.

Step #2: Asset Spreadsheet

As Funding Coordinator, I will scan your asset documentation into our database, review it, and then prepare an initial "Asset Spreadsheet". Two weeks before your Signing Ceremony I will mail you a copy of this initial spreadsheet to review for accuracy.

It's important that we are on the same page with respect to what you own, so that we can ensure the proper titling of your assets (if I am completing your paperwork) or give you the correct instructions (if you are completing the paperwork).

Step #3: Obtaining Funding Forms and Coordination With Your Advisors

Please request Change of Beneficiary forms for employer provided life insurance and retirement accounts directly from your employer.

If we are handling your funding, I will obtain Change of Ownership and Change of Beneficiary Forms from your non-employer held assets whenever possible. In some cases, I will need to ask you obtain these forms and forward them to me. My intention is to have as many of them completed for your signature as possible when you return for your signing ceremony.

We prefer to have a signed Authorization to Disclose on file so that I can communicate directly with your Financial Advisors or Insurance Agents to obtain these forms and other information without your direct involvement. When we are able to team-up with your advisors, the entire funding process is expedited and ensures prompt and accurate funding of your Trust with the least involvement by you.

If we are guiding you to handle your own funding, you should begin contacting each of your account custodians and obtain these forms as soon as possible. At your signing ceremony, we will give you your Funding Toolkit and specific guidance as to what to do with these forms.

If you have not already done so, please let me know who your advisors are, and e-mail, fax, mail or drop-off your most recent asset statements . . .

And please do not hesitate to call with any questions!

Warm regards,

<Name, Firm Address & Ph #>

Client Services Specialist Introduction Email

Hi ~Contact.FirstName~,

I'm the Client Services Specialist at \_\_\_\_\_\_\_\_\_\_\_, which means I assist <CSD> during your planning phase and I am your lead contact post-planning for issues related to the formation of or maintenance of business entities, as well as the maintenace of life insurance trusts and I'll be here to guide you when you have a death in the family.

I'm the one who handles the complications when things have not been adequately taken care of, so if your parents are living, I urge you to take advantage of the VIP Membership Program benefit of a free estate check up for your parents to make sure things will be as easy as possible for you when something does happen.

Please feel free to contact me at any time with questions about the "after death" administration process whether it's a probate or a trust administration.

If you have a corporate entity, such as an LLC or a Corporation, and you have not already done so, please send me your corporate records so I can ensure they have been maintained properly to provide the maximum amount of liability protection from lawsuits.

Too many people do not adequately maintain their corporate entities and lose the valuable protections they provide. As the law firm for your whole wealth, we are here to make sure that everything you have is structured for maximum protection.

I look forward to ensuring the protection of your family for many years to come.

Warmest regards,

<Name, Firm Name & Address & Ph #>

Fulfillment Email to CSD: New Client Update Infusion

Hi,

We have a new client. Here are the steps you should take to update their info in infusion.

Search the client's last name in infusion and pull up the existing contact record. Update any missing information, such as email, phone number, and address. If they are single, add their contact record to the group Client Mailing Labels and Confirm they are in the Client Ind Records Group.

Header

Here you will enter the Client Information for one who has just engaged, making sure partnered clients' names are entered correctly. Also, make sure you enter the main email address so that it doesn't create a duplicate.

Success Page

Great! We have a new client! Thank you!

NOTE: You can also enter the code to close the window:

<form>

<input type=button value="Close Window" onClick="javascript:window.close();">

</form>

CLIENT RETENTION

WRITE INTRO HERE

FAMILY WEALTH VIP MEMBERSHIPS

WRITE INTRO HERE

SALES FORM: Family Wealth VIP Membership – Trust Plan

You will need to create this Sales Form for all Membership Programs customizing each one for the membership type. Use this one as a template for all.

Fields

The sales form automatically generates required fields for processing the credit card. If there are other fields you need to capture, you can edit them by opening the sales form.

Action Sequences

|  |  |
| --- | --- |
| **Add/Remove From Group** | Add to 2 groups/categories:  - Membership Clients  - VIP Membership-Trust Plan |
| **Add/Remove/Pause Campaign** | Add to 1 campaigns/categories:  - VIP Membership-Schedule Annual Review |
| **Send Email** | Send "VIP Membership Welcome Email" |
| **Add/Remove/Pause Campaign** | Remove from 1 campaigns/categories:  - 3-Year Review |
| **Add/Remove From Group** | Remove from 1 groups/cateogries:  - Membership Prospects |

Campaigns

VIP Membership Annual Review Campaign

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Status | Schedule |
| VIP Membership Annual Review | Fulfillment List | Active | Delay 365 Days |
| MNA VIP Membership Task Creation | Task | Active | Delay 365 Days |

Actions Upon Completion:

|  |  |
| --- | --- |
| **Add/Remove/Pause Campaign** | Remove from 1 campaigns/categories:  - VIP Membership-Schedule Annual Review |
| **Add/Remove/Pause Campaign** | Add to 1 campaigns/categories:  - VIP Membership-Schedule Annual Review |

Templates

Email to Contact: VIP Membership Welcome Email (w/ VIP Membership Fee Schedule Attached)

Dear ~Contact.FirstName~,

Thank you for joining the our VIP Membership Program. It's great to have you as part of our family! Please find attached the benefits schedule for your records.

As always, if there is anything I can do to help you, please don't

hesitate to call me.

Once again, thank you and welcome!

To Your Family's Health, Wealth, and Happiness,

<Attorney Name>

Fulfillment Email to CSD: VIP Membership Annual Review

Please find attached those members who are due an annual review. Call to schedule an appointment.

INCLUDE SCRIPT (NEEDS TO BE WRITTEN)

Task: VIP Membership Task Creation

Please call ~Contact.FirstName~ ~Contact.LastName~ to schedule this VIP Member's Annual Review.

Header

**Welcome!**

**To continue your enrollment,**

**please complete all fields**

**at the end of this page,**

**and you're in!**

Success Page

**Congratulations!**

**You are our newest VIP Member of the Trust Plan!**

**You can start enjoying your benefits immediately.**

**Shorly, you’ll receive an email with your**

**benefits attached.**

**Thank you!**

**You’ve made a GREAT decision in protecting your family**

WEB FORM: Send Email to Membership Prospect

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Actions

|  |  |
| --- | --- |
| **Create Lead** | Create a lead record for the contact |
| **Add/Remove From Group** | Add to 1 groups/categories: - Membership Prospects |
| **Send Email** | Send "VIP Membership Prospect Email" |

Templates

Email to Membership Prospect

Dear ~Contact.FirstName~,

~Insert HERE the merge field for your Custom Note-Membership Prospects~

Our Family Wealth VIP Membership programs are part of what set us apart and allow us to care for you and your family throughout all of life's stages and ensure your plan stays up to date and will work when your family needs it to work.

When you completed your Estate Plan with our firm, we promised you a review of your plan every 3 years at no charge. If you decided to make changes to your plan at that time, there would be a fee for those changes.

With your Family Wealth VIP Membership, you would receive a YEARLY review of your plan and you would not have to pay for any changes so long as you maintained your same planning structure.

In addition to the over $4000 in enrollment bonuses you'd receive for joining, one of the most exciting benefits is you will also begin building your Legacy Library and passing on not only your financial wealth, but your most valuable and intangible whole Family Wealth or who you are and what's important to you by having a Priceless Conversation with us each year at your annual plan review.

Attached, you will find the Family Wealth VIP Membership Benefits & Fee Schedule and an enrollment form. I urge you to take advantage of the plan that best suits your needs for your family and your wealth.

If you have any questions, please don't hesitate to contact me. I'm here to help!

Warmly,

<CSD>

PS - Normally, there is an enrollment and updating fee, but if you join now, I would be able to waive that fee for you. Please contact me to get started.

Header

Use this form to send to a membership prospect an email with the PDF files attached.

Please type in your opening paragaph, which will be included in the email. Below, you'll see the rest of the email template so use your opening paragraph to create a flow of good communication.

**Remember: DO NOT PRESS ENTER WITHIN THE OPENING PARAGRAPH.**

Footer

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Warmly,

<CSD>

PS - Normally, there is an enrollment and updating fee, but if you join now, I would be able to waive that fee for you. Please contact me to get started.

Success Page

**Thank you! Your email has been sent!**

<form>

<input type=button value="Close Window" onClick="javascript:window.close();">

</form>

WEB FORM: 3-Year Review

Fields

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| --- | --- | --- | --- |
| |  | | --- | |  | | Optional | Required |
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Action Sequences

|  |  |
| --- | --- |
| **Add/Remove/Pause Campaign** | Add to 1 campaigns/categories:  - 3-year Review |

Campaigns

3-Year Review

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Status | Schedule |
| Call to Schedule 3-Year Review | Fulfillment List | Active | Delay 1095 Days |
| 1st Letter for 3-Year Review | Letter | Active | Delay 1109 Days |
| 2nd Letter for 3-Year Review | Letter | Active | Delay 1123 Days |

***Action on Completion***

|  |  |
| --- | --- |
| **Add/Remove/Pause Campaign** | Remove from 1 campaigns/categories:  - 3-year Review |
| **Add/Remove/Pause Campaign** | Add to 1 campaigns/categories:  - 3-year Review |

Templates

Fulfillment Email to CSD: Call to Schedule 3-Year Review

The attached list are the ones who should receive an initial call for scheduling the 3-year review.

Include SCRIPT (TO BE WRITTEN)

Letter: 1st Letter for 3-Year Review

Inside Campaign step to send letter, put this inside the PROCESSING INFORMATION:

Please confirm that you haven't heard from this client for a 3-Year Review Appointment. If you have not, please send.

Date

~Contact.FirstName~ ~Contact.LastName~:

~Contact.StreetAddress1~

~Contact.StreetAddress2~

~Contact.City~, ~Contact.State~   ~Contact.PostalCode~

**Re:      It’s Time For a Visit!**

Dear ~Contact.FirstName~,

Can you believe it’s been more than three years since we last saw you?

I can’t, but our calendar says it’s so and that means it’s time to review your Family Wealth Plan to **assure your plan continues to meet your needs**, your **assets continue to be held in the proper manner** for maximum protection of your family after you are gone and that **none of your assets ever become part of the $5.2 Billion in the CA Unclaimed Property Division.**

If we do not review your plan, it is likely to **NOT WORK when your family needs it!**

In addition, we’ve discovered a tool that allows us to ensure the passage of not only your financial wealth after you are gone, but your **even more valuable (and most often lost) Family Wealth** – who you are and what’s important to you.  This is truly what your family will treasure most after you are gone and well after the money has dissipated.

When you come in, we’ll have a “Priceless Conversation” with you (we’ll send you the questions in advance).  We’ll record the conversation and turn it into a Priceless Conversation CD, which will become the first piece of your **Legacy Library, a gift your family will truly treasure**.

**Here’s what you should do next to start building your Legacy Library:**

Call me to schedule your personal plan review and Priceless Conversation meeting.

There is **NO CHARGE** for this meeting.  It’s included in the planning fee you paid when you first engaged our firm.  And, we’d love to see you!

We’ll schedule your meeting approximately 4 weeks from the time that you call so we have time to prepare your planning review letter and a listing of your assets and give you time to gather your updated asset information.

At that time, we’ll send you a letter that lets you know just how to prepare for our meeting.

I look forward to hearing from you soon!

Best regards,

<Name>

Client Services Director

Letter: 2nd Letter for 3-Year Review

Inside Campaign step to send letter, put this inside the PROCESSING INFORMATION:

Please confirm that you haven't heard from this client for a 3-Year Review Appointment. If you have not, please send.

Date  
  
  
~Contact.FirstName~ ~Contact.LastName~:  
~Contact.StreetAddress1~  
~Contact.StreetAddress2~  
~Contact.City~, ~Contact.State~ ~Contact.PostalCode~  
  
**Re:     We Need To Hear From You!**  
  
Dear ~Contact.FirstName~,

We’ve called and sent you a letter and we haven’t heard back from you about the three-year review of your Family Wealth Plan.  
  
Don’t miss out on this valuable part of your relationship with us.  You’ve paid for this benefit already; so, **don’t let it go to waste**.  If you don’t come see us for the review of your plan, it’s likely your plan won’t work when your family needs it.    
  
**It’s critical that we conduct this review** with you to **assure your assets continue to be held in the proper manner** for maximum protection of your family after you are gone and to assure that **none of your assets ever become part of the $5.2 Billion in the California Unclaimed Property Division**.   There is **NO CHARGE** for this review.

After scheduling your meeting, we’ll send you the information you will need to review prior to your meeting.  We will also send you the “Priceless Conversations” questions we’ll ask you for the recording of our “Priceless Conversation”.  It’s not necessary to study the questions.  You do not need to prepare your answers; they’ll come naturally from your heart.

**Call me to schedule time for your personal plan review.** 

Please do not hesitate to call if you have any questions.  We look forward to seeing you!  
  
Best regards,  
  
  
  
<CSD Name>  
Client Services Director

Header

Please enter client information.  This will add client to the campaign to create tasks and reminders that this client is due a 3-year review at the appropriate time.

Success Page

You're done!

Need to add another one?  Click HERE.

(Insert link in HERE for returning to web form)

WEB FORM: 3-Year Review - Scheduled

Fields

|  |  |  |  |
| --- | --- | --- | --- |
| |  | | --- | |  | | Optional | Required |
| |  | | --- | |  | | Optional | Required |
| |  | | --- | |  | | Optional | Required |

Action Sequences

Add to Group: 3-Year Review Scheduled

Header

Success Page

My page templates

Fields

Action Sequences

Campaigns

Templates

Header

Success Page

PROFESSIONAL PLANNING PARTNERS

Implementing a Professional Planning Partner Program strengthens your ability to get referrals from other businesses and professionals by offering reciprocal benefits and referrals.

Here is the complete plan for implementing and maintaining your own Professional Planning Partners Program.