

Trust Advisors Forum

End of (*inefficient*) Lawyers, Thank Goodness

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Hargrove Traughber LLP - NetLaw

Estate Planning || Estates & Trusts || Tax Planning ¹

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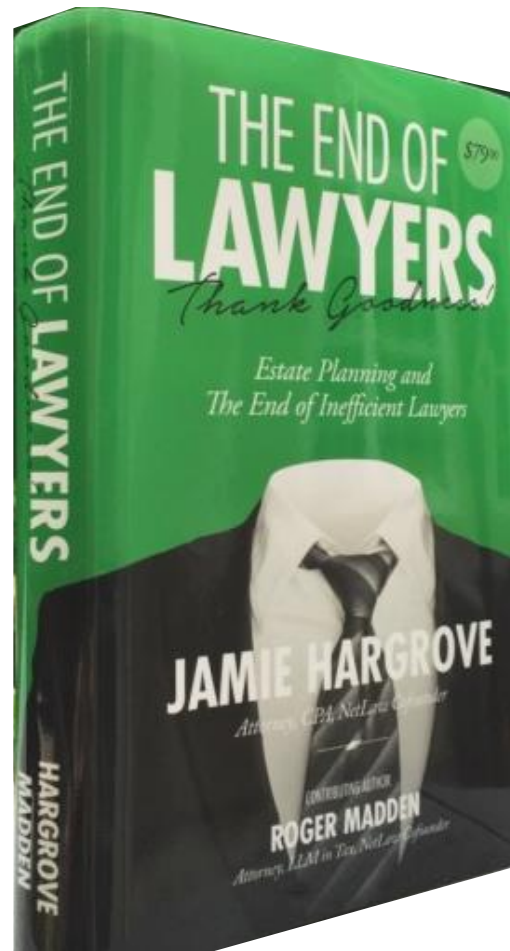
TOPICS:

- End of Lawyers?
- On-Line Estate Planning ?
- Unauthorized Practice of Law – Dos & Don'ts
- Finally, e-Myth for Advisors
(Bringing Systems & Processes...and Technology and Marketing to the financial planning industry)
- Getting Advanced (Ultra High Net Worth) Planning Engagements in the New World
- Secrets to keeping Assets under management
- Data-driven marketing (how & why) Do they work?

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The End of Lawyers, Thank Goodness!



Really!

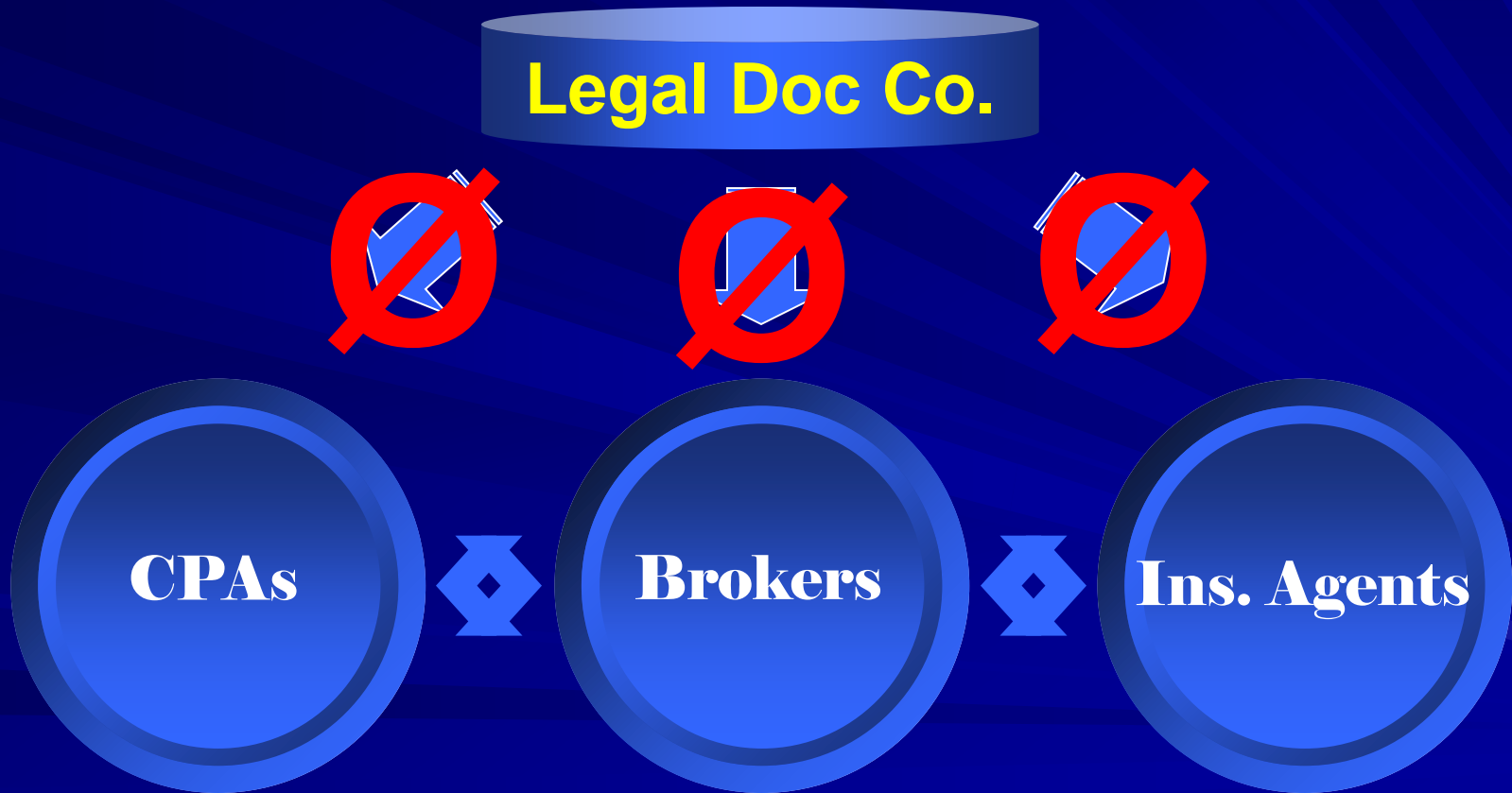
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**Will Online Estate Planning
Revolutionize the Financial
& Estate Planning Process?**

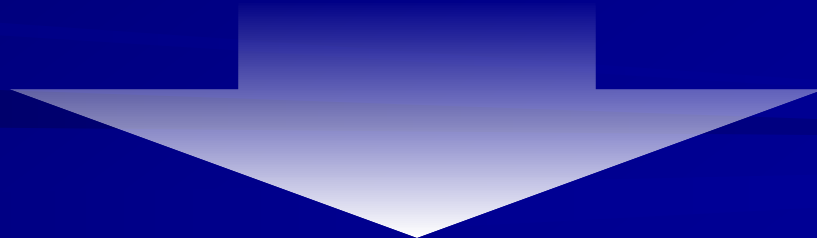
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Legal Document Companies



How legal “document companies” can be used by investment management professionals, financial planners, insurance professionals and CPAs to generate long-standing business relationships. And without risks of claims of unauthorized practice of law.



How does virtual planning solve the problems that other document companies have?

Advisor in the Loop



How
“Prototype”
Pension Plans
changed my life!

The IRS estimates that at least 94 percent of all qualified **retirement plans** are pre-approved (Prototype) **plans**.

Adoption Agreement And Plan Document

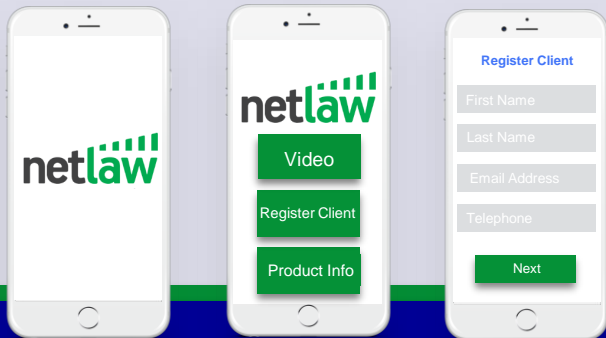
The adoption agreement and plan document explains the plan's annual contribution limits, how contributions may be invested, the types of investments that are prohibited (e.g., collectibles), how and when the account funds may be withdrawn, provisions regarding required distributions, under what conditions the account may be transferred, what will happen to the account if the owner (depositor) dies, and what fees and expenses are associated with the plan.

Groundwork for authorized
(or ignored) UPL

Online Estate Planning sold by Financial Institutions

How It Works

Agent



- 1 Show Video
- 2 Take Survey & Show Plans
- 3 Register Customer/Collect Payment



- NetLaw will handle the rest!**
- ❑ Customer receives NetLaw welcome email
(email can be branded to Agent and/or Financial Institutions)
 - ❑ Customer Clicks “Let’s Get Started”
 - ❑ Customer Completes Estate Plan!
 - ❑ Documents saved in LifeVault
(LifeVault can be branded to Agent and/or Financial Institutions)
 - ❑ NetLaw’s marketing program begins!!

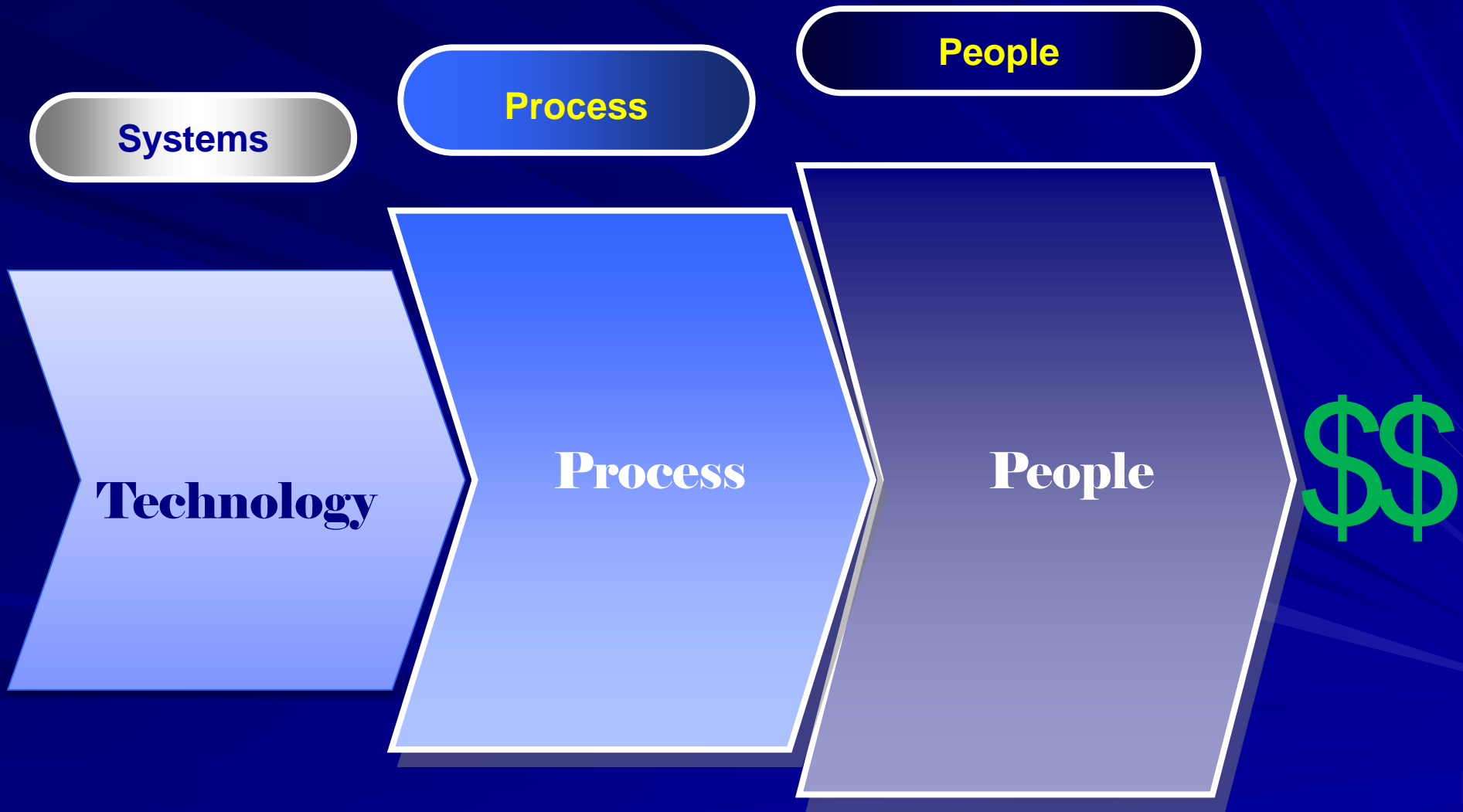
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**e-Myth
(Bringing Systems &
Processes...and Technology to
change planning)**

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Systems & Processes



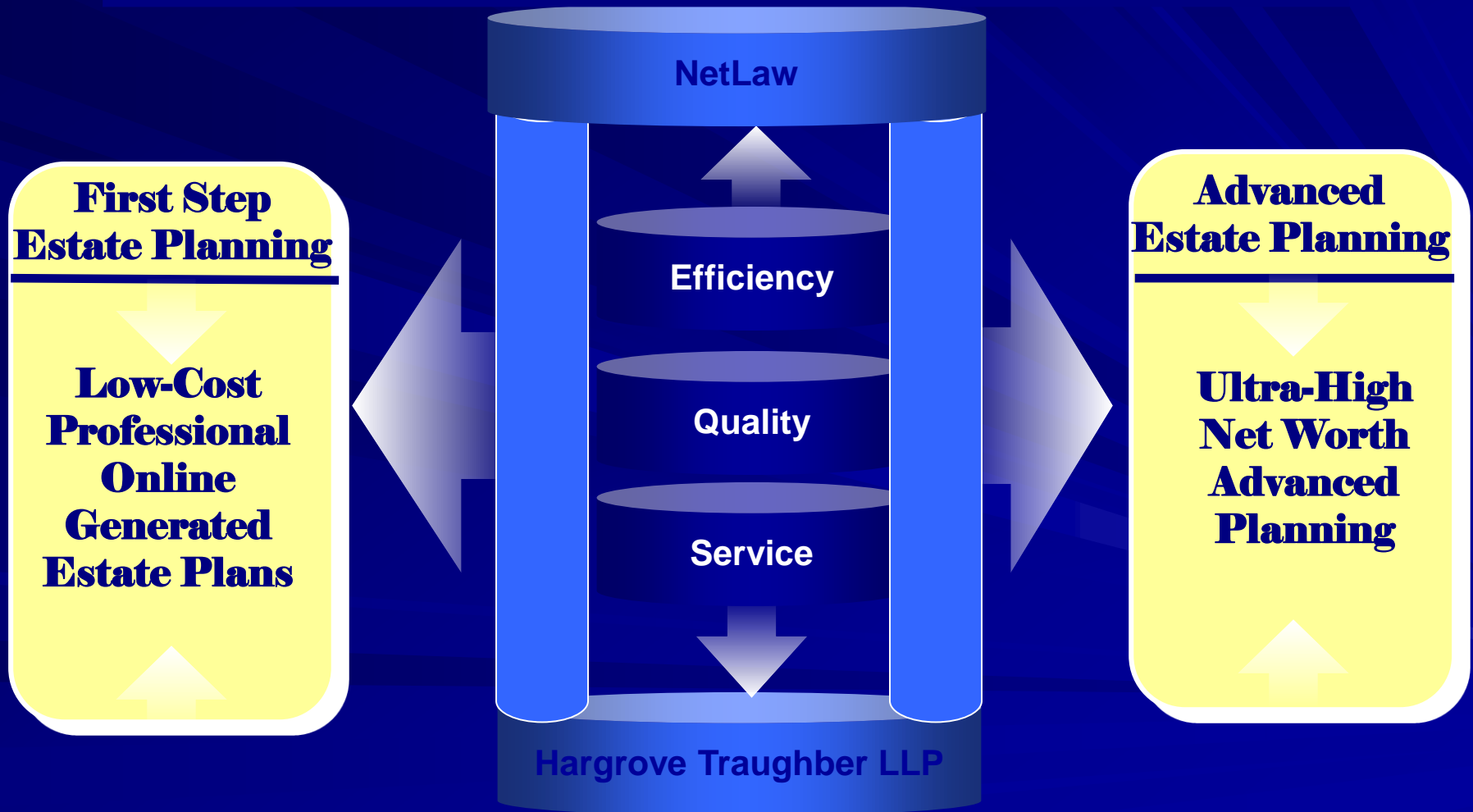
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**Getting (*or keeping*) Advanced
(Ultra High Net Worth)
Clients**

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From Low Profit Commodity Services to High Margin Services





Specialty

Commodity-Advanced

Commodity-Primary

Commodity-Basic

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**Data-driven marketing
(how & why)
Do they work?**

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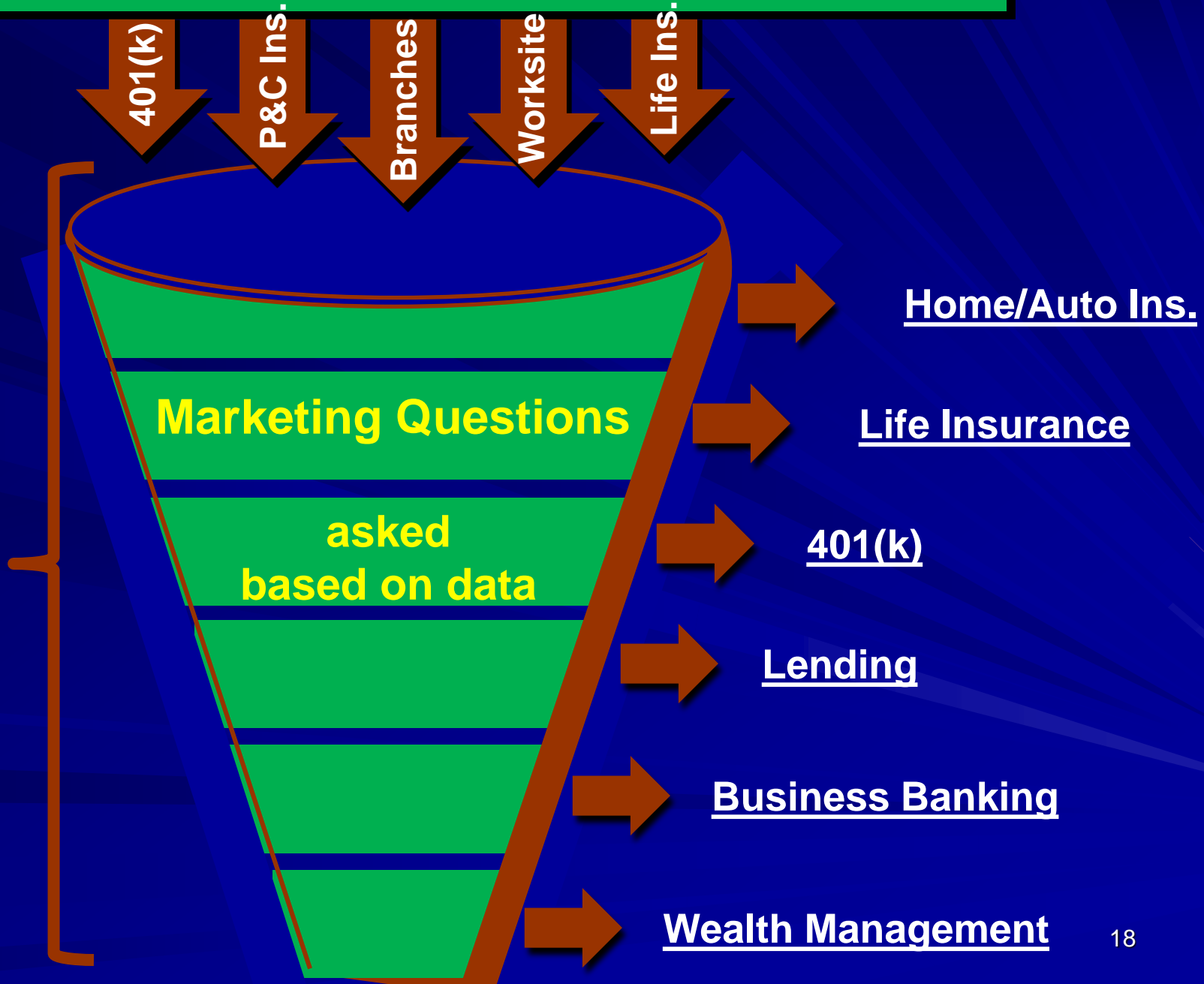
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Systems & Processes: Marketing



90% have not planned to avoid Probate
60% have no Will or Healthcare Documents

Data Collection
Document Storage



Cross Marketing Between Silos & Banking Divisions helps us ask the right questions to generate more Revenue

Good Data
Captured



Through Various
Resources



Right Questions
Asked



Better
Referrals



Smart Guide



Email
Campaign



Call Center

??



*Would you like a quote
for homeowners or auto
insurance to make sure
you aren't paying too
much?*



*Would you like to see if
you can refinance your
home and lock in on a
lower rate before rates
start to go back up?*

\$\$

Retirement

Property Casualty

Life Insurance

Wealth Planning

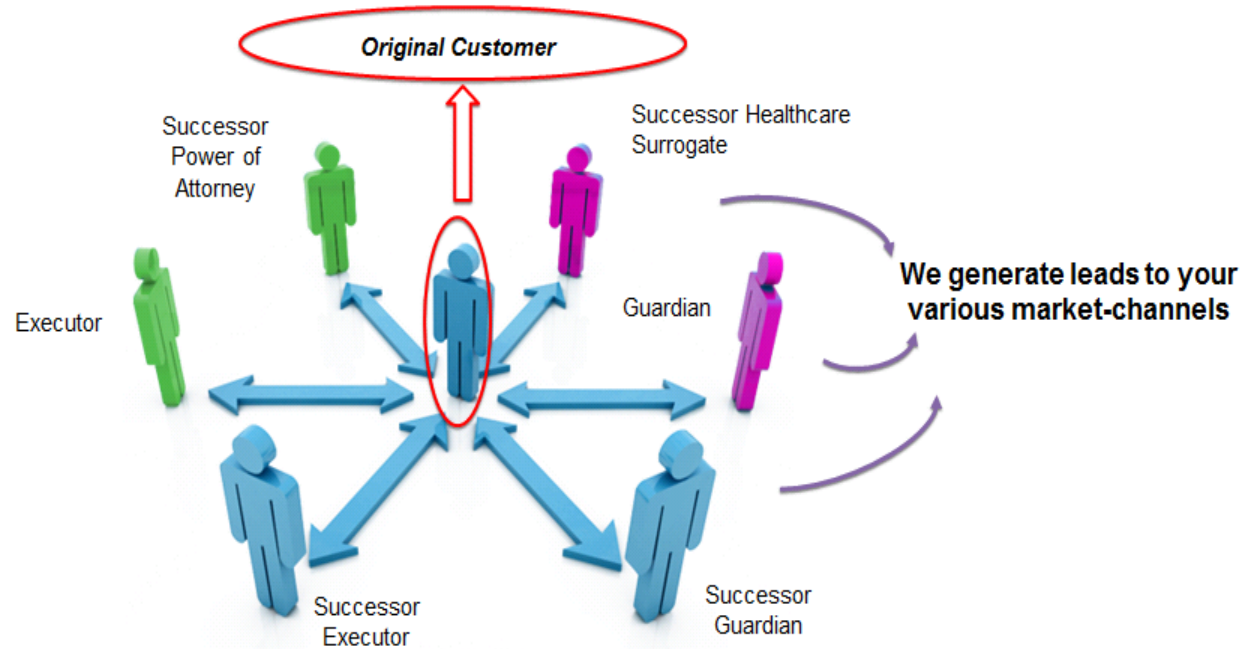
Retail Banking

47% answer
"yes"



Lead Generation - Key People

We will market to the Customer's "Key People" and then use our marketing questions and other follow-up to generate leads to your various banking divisions



Vault Systems

(Cloud-based Safe Deposit Boxes)

Thank You!!!
