



Estate Planning Newsletter

THE RESULTS ARE IN!

Our last newsletter talked about estate planning goal setting. As a result, free trials are pouring in as sales continue to soar. It is the easiest way to set and achieve your goals.

That said, we have had numerous calls asking how our estate planning goal setting process works. One of the biggest reasons most people fail at realizing their financial goals is they can't accurately figure out a way to measure their progress. When the goal is about earning money, it can be challenging. That's not the case for setting financial planning goals since they have everything to do with how you are saving and investing money for the future.

Our method is "failure proof". It is not about how much money you earn but rather about how many FREE trials you give away. With our FREE trial offer, you can easily give away an Estate Plan without the prospect committing to anything. FREE is one of the most powerful words in the English language. Companies who have incorporated the term into their businesses have become house hold names. For example, Face Book and Google.

Here's how our process works. Commit to sending out 20 Free Trials a month. You can easily count how many are converting to sales each week. It isn't about the money. It's about converting the FREE trial to a sale. That's our process. It begins with creating a list of who you are going to give the trial to. Next, make sure the person understands the difference between the government's plan and having their own plan. Our video will train you on how to explain the negative consequences of having the government's plan. Compare those consequences to having a custom plan and there's no way the prospect can say they prefer to have the government plan.

The logic is not to talk the prospect into buying the plan. No one wants to be "sold", they want to buy once they understand. Estate Planning is more "top of mind" than ever. People who have any sort of financial wherewithal or a family are wanting to know more about how estate planning works. These are your prospects. All you have to do is educate them to understand and acknowledge the benefit of having their own plan versus the government's plan. It's not about selling! It is 100% about educating. Our videos instruct you on how to explain the difference. Yes, the government's plan is no contest as compared to having a custom plan. The people you give the FREE trial to will also give you names of their friends and family to also receive their FREE trial.

Tracking your progress for conversions is easy. The more you use this process, the better you will understand where you need to improve. I can guarantee that your conversion rate will increase as you invest time convincing yourself that this form of planning is just as important as financial planning. Your attitude will determine your altitude. You have invested in the nations' #1 software platform for comprehensive estate planning. One part of what you invested in enables you to give away FREE trials as a way to show people how easy and convenient our software is to use. But first, you have to convince yourself for how important it is to have an estate plan.

Each month your conversion percentage will improve. Stay consistent. In a matter of a few months, your income will increase by 5 figures. BTW, this is the best way to attract new clients who will in turn introduce you to more clients!

Do you have your plan?