

EMAIL DRIP TEMPLATE:

Couples Estate Planning Workshop

Subject: Where to start with your estate plan

Hi [Client's First Name],

I know estate planning isn't something you and [Spouse's First Name] particularly enjoy talking about. But if something ever happened to either of you, wouldn't you rather have things set up the way you want instead of someone else deciding for you?

That's why you and [Spouse's First Name] should talk about this together— actually sitting down and figuring out what makes sense for your family and not just leaving it up to one of you.

I put together a worksheet that makes it easier to get started. You don't have to do it all in one go, just take a look and start thinking through:

- Who steps in for finances or medical decisions if one of you can't?
- What happens to everything you've worked for?
- If something happened to both of you, who takes care of the kids?

[Here's the worksheet.] *(Insert Link)*

This doesn't need to be perfect. You can adjust things later. But getting something in place now? That matters. If any of it feels weird or tough to talk about, let me know. I can help.

Best,

[Your Name]

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Subject: What happens if you don't have an estate plan?

Hi [Client's First Name],

I get it, estate planning doesn't feel urgent. But it isn't until it is, and waiting doesn't make it any easier. It actually makes it harder, because if you don't have a plan, things get decided for you.

If something happened tomorrow, could:

- [Spouse's First Name] immediately handle your finances? Even though you're married, there could be legal hurdles without a plan.
- Would your assets go where you want them to? A court could decide, even if it's not what you wanted.
- Who raises your kids if you're not here? If you haven't named someone, a judge will decide.

That's the reality. And it's exactly why people take care of this now, before life forces their hand. You don't need to have it all figured out today, but you do need to start. That worksheet I sent is a good first step.

[Here's the worksheet again.] *(Insert Link)*

If anything in there feels confusing or hard to talk about, let's go through it together. Just reply and we'll set something up.

Best,

[Your Name]

EMAIL DRIP TEMPLATE:

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Subject: Why estate planning isn't just for later

Hi [Client's First Name],

Nobody wants to put off their estate plan, most people just don't think it's a high priority. But waiting can mean things get stressful if something were to happen to you or [Spouse's First Name]. In the event something does happen, there could be court hearings, legal costs, and people making decisions you may not have agreed with.

By spending the time to make those tough decisions now, it's likely everything will run smoother.

- Your spouse can step in and handle things if needed.
- Your kids will be taken care of by someone you actually chose.
- Your assets go exactly where you want them to—without a bunch of extra legal headaches.

So even if you and [Spouse's First Name] haven't had a chance to go through the worksheet yet, I recommend that you take the time to do it this week. Even if you just get a few basics in place, it'll make a huge difference. And you can always make changes later.

[Here's the worksheet again.] *(Insert Link)*

If anything feels overwhelming, don't stress. I can help walk you through it.

Let me know if you want to chat

Best,

[Your Name]