

Estate Planning as a Growth Strategy

How advisors turn estate conversations into new clients, deeper relationships, and reach the next generation.

TODAY'S TAKEAWAYS

Six things you'll be able to do by the end of this hour.

- 01** Use estate planning as a practical growth lever *and* a planning service.
- 02** Build digital visibility around estate planning across web, search, and social.
- 03** Use estate conversations with prospects to create urgency and trust.
- 04** Surface gaps, held-away assets, and family dynamics inside existing client reviews.
- 05** Create natural introductions to heirs, trustees, attorneys, CPAs, and other COIs.
- 06** Launch a simple, repeatable 30-day estate planning campaign.

Estate Planning Checklist & Email for Clients & Prospects Coming Your Way!

Beyond the Portfolio Checklist

What your family needs to know – and where to find it

Most estate plans cover the legal documents. This checklist covers everything else: the practical details your spouse or family would need to handle your digital life, your accounts, and your final wishes if something happened to you.

Work through each section, gather what you can, and store everything somewhere your family can access it.

Digital Access

- Phone PIN and device passcodes
- Password manager login (e.g., 1Password, LastPass)
- Two-factor authentication app and backup codes
- Instructions for key apps: banking, email, investment platforms
- Crypto wallet access and recovery keys, if applicable
- Social media preferences for each platform: memorialize, delete, or leave unchanged

Financial & Legal

- Will and power of attorney
- Health care directive and living will
- Life insurance policies
- Bank and investment account details
- Property deeds and vehicle titles
- Business documents, if applicable
- Contact information for your financial advisor, attorney, and accountant

Identity & Health

- Passport and driver's license
- Health insurance card
- Medical and dental records
- Birth and marriage certificates

A GROWTH LEVER, NOT A SERVICE

Estate planning answers the three growth questions every advisor is already asking.

01 · PROSPECTS

How do I start better conversations with prospects?

02 · CLIENTS

How do I create more value for the clients I already have?

03 · FAMILY

How do I stay connected to the family before assets transfer?

WHY ESTATE PLANNING CUTS THROUGH

Clients may dodge fees and performance. They rarely dodge family.

Estate planning connects to what clients actually care about — family, privacy, legacy, clarity, and protecting the people they love.

• Family

• Privacy

• Legacy

• Clarity

• Protection

THE ADVISOR GROWTH FLYWHEEL

One conversation. Five places it pays off.

-
- | | | |
|-----------|------------------------|---|
| 01 | Prospect acquisition | A high-trust reason for new prospects to engage you first. |
| 02 | Client retention | Value beyond portfolio management — clarity, structure, peace of mind. |
| 03 | Wallet-share discovery | Held-away assets, titling issues, beneficiary gaps, liquidity needs. |
| 04 | Next-generation | Meet heirs and trustees long before the wealth transfer happens. |
| 05 | COI collaboration | Natural reasons to work alongside attorneys, CPAs, and business advisors. |
-

LIFE EVENTS THAT TRIGGER CONVERSATIONS

Every life event is a reason to ask: does the plan still match the life?

- New child or grandchild
- Retirement
- Business sale
- Blended family
- Divorce or remarriage
- Aging parents
- Charitable intent
- Liquidity event
- Move to a new state
- Death or illness in family
- Sale of real estate
- Sale of business interests

When a prospect says “*we already have a plan,*” that's where the real conversation starts — when was it created, who is named, are the assets titled correctly, is the successor trustee still the right person?

THE CAMPAIGN BLUEPRINT

Eight assets, one connected campaign.

01

Website Page

A dedicated estate planning page with clear CTAs.

02

Google Profile

Add estate planning as a service for local discovery.

03

Checklist

A downloadable readiness asset that lives everywhere.

04

Email Series

A multi-touch nurture sequence for clients and prospects.

05

Social Posts

Question-led posts that invite engagement, not pitch.

06

Event QR Code

Physical-to-digital bridge at seminars and dinners.

07

Follow-Up

Workflows tuned to how the lead actually engaged.

08

Meeting CTA

One clear next step on every surface.

Make Estate Planning a Cornerstone of Your Website

The screenshot shows the top portion of the Fortitude Wealth Management website. The header includes the logo and navigation links: Who We Are, What We Do (underlined), Resources, and Contact. The main heading is 'CAPABILITIES & SERVICES' followed by 'A Coordinated Estate Strategy.' Below this is a paragraph: 'Estate planning is an ongoing process that integrates tax strategy, asset structure, and long-term intent. We coordinate the following services to ensure every element works with clarity and purpose.' A list of services follows: Estate Tax Strategies (with a right-pointing arrow), Attorney Partnership, In-House Services, and Trust & Gifting. To the right, a separate box titled 'PLANNING FOR TAX THRESHOLDS' contains the heading 'Estate Tax Strategies' and the text 'For clients whose assets may approach estate tax thresholds, we'. A 'BrokerCheck by FINRA' logo is visible in the bottom right corner of the screenshot.

The screenshot shows the 'ESTATE STRATEGY' section of the Fortitude Wealth Management website. The header includes the logo and navigation links: Who We Are, What We Do (underlined), Resources, and Contact. The main heading is 'ESTATE STRATEGY' followed by 'Estate Planning with Thoughtful Structure'. Below this is a paragraph: 'A careful approach to structuring what matters most.' A yellow button with the text 'START THE CONVERSATION' is positioned below the paragraph. The background features a dark image of sailboats on the water. A 'BrokerCheck by FINRA' logo is visible in the bottom right corner of the screenshot.

Make Estate Planning a Cornerstone of Your Website



THE ESTATE PLANNING PAGE

What every advisor's estate planning page should answer.

- Who the service is for
- How you coordinate with attorneys & CPAs
- FAQs (good for AI search)
- When someone should review
- Common triggers for a review
- Earned media mentions

PRIMARY CTA

Schedule an Estate Plan Review

SECONDARY CTA

**Download the Estate Planning
Readiness Checklist**

Add content on Estate Planning Topics at least Quarterly

The screenshot shows the Prosperity Capital Advisors website. At the top, there is a dark blue navigation bar with a phone icon and the number (845) 297-0300 on the left, and social media icons for X, LinkedIn, YouTube, Facebook, and Instagram on the right. Below this is a white navigation bar with the Prosperity Capital Advisors logo on the left and menu items: About Us, Who We Serve, Services, Resource Center, Contact, Account Access, and 403(b) Access. The main content area features three article cards. Each card has a square image at the top, a title, a short paragraph of text, and a 'LEARN MORE' button at the bottom. The first card has a black and white image of hands holding a ring, the title '5 Common Estate Planning Mistakes', and text about avoiding mistakes. The second card has a sunset image of a family, the title 'How to Maximize Your Estate Plan Before the Great Tax Sunset', and text about leveraging 2017 tax changes. The third card has a woman with a child at a laptop, the title 'Estate Planning: Do you Have These Documents Prepared', and text about essential planning documents. At the bottom right, there is a 'BrokerCheck by FINRA' logo and an upward arrow icon.

(845) 297-0300

PROSPERITY CAPITAL ADVISORS

About Us Who We Serve Services Resource Center Contact Account Access 403(b) Access

5 Common Estate Planning Mistakes
Avoid common estate planning mistakes that can burden your loved ones. Learn how to safeguard your assets, communicate your wishes, and leave a lasting legacy.

LEARN MORE

How to Maximize Your Estate Plan Before the Great Tax Sunset
Discover essential estate planning strategies to leverage the 2017 tax exemption changes before they expire in 2026.



















LEARN MORE

Estate Planning: Do you Have These Documents Prepared
Discover essential estate planning documents to plan your legacy: wills, trusts, living trusts, living wills, beneficiary designations, and powers of attorney.

LEARN MORE

BrokerCheck by FINRA

FMG Has Estate Planning Emails, Social Posts, Interactive Content

Content Library					 
<input type="text" value="Estate"/> × <input type="button" value="Search"/>					
<input type="checkbox"/> Favorites <input type="button" value="Category"/> <input type="button" value="Topic"/> <input type="button" value="Author"/>					
Title	Category	Type	Author		
 A simple way to get your estate plan organized	Emails	Email	FMG	<input type="button" value="Use"/> 	
 Clients and Prospects: What Is a CCRC (and Should It Be Part of Your...	Emails	Email	Do It For Me	<input type="button" value="Use"/> 	
 COIs: What Is a CCRC (and Should It Be Part of Clients' Retirement S...	Emails	Email	Do It For Me	<input type="button" value="Use"/> 	
 First Year of Retirement: What to Expect	Web Content	Article	FMG	<input type="button" value="Use"/> 	
 Understanding Financial Gift-Giving [Carousel]	Social Posts	Social Post	FMG	<input type="button" value="Use"/>	
 Understanding Financial Gift-Giving [Carousel]	Downloadables	Social Media Asset	FMG: Instagram	<input type="button" value="Use"/>	
 What Is My Net Worth?	Web Content	Calculator	FMG	<input type="button" value="Use"/> 	
 Why the American Dream Still Starts at Home National Homeowner...	Social Posts	Social Sequence	FMG	<input type="button" value="Use"/>	
 5 Estate Considerations for the LGBTQ+ Community [Carousel]	Social Posts	Social Post	FMG	<input type="button" value="Use"/>	
 An Update on the Mortgage Market	Social Posts	Social Post	FMG	<input type="button" value="Use"/>	
 August is Make-A-Will Month [Post]	Social Posts	Social Post	FMG	<input type="button" value="Use"/>	

Use Interactive Content to Start Conversations

The screenshot shows the NAVIS Wealth Advisors website. At the top left is the NAVIS logo with the tagline 'WEALTH ADVISORS'. To the right is a navigation menu with links for 'About Us', 'Our Services' (which is underlined), 'Client Access', 'News and Insights', 'Giving Back', and 'Contact Us'. Below the navigation is a section titled 'Quizzes & Calculators' containing three interactive content cards. Each card features a background image, a title, a brief description, and a 'LEARN MORE' button.

NAVIS
WEALTH ADVISORS

[About Us](#) [Our Services](#) [Client Access](#) [News and Insights](#) [Giving Back](#) [Contact Us](#)

Quizzes & Calculators

Test Your Estate Strategy Knowledge

Estate management can help ensure that your assets are transferred according to your wishes while managing tax issues.

[LEARN MORE](#)

Value Growth Liability

What's My Potential Estate Tax?

This calculator helps estimate your federal estate tax liability.

[LEARN MORE](#)

What's My Life Expectancy?

What Is My Life Expectancy?

Estimate how many years you may need retirement assets or how long to provide income to a surviving spouse or children.

[LEARN MORE](#)

Google Business Profile

I am looking for a financial planner in Philadelphia, PA. I want them to serve as the main point of contact between my CPA, estate planning attorney and other professionals. They should have a large focus on helping affluent families handle complicated estates

ACTION ITEM

Add **estate planning** to the services section of your Google Business Profile so local prospects can discover the firm.

Searching for places >

Map data ©2026 Google

Business Name	Rating	Category	Description
Roffman Miller...	5.0 ★ (2)	Finance	Fee-only fiduciary RIA — ideal for complex estate...
Liberty One Wealth...	5.0 ★ (90)	Finance	Holistic wealth management with strong...
Zenith Wealth Partners	5.0 ★ (47)	Finance	Handles estate documents and long-term legacy...

THE CONVERSATION LADDER

Five questions that move a prospect from awareness to action.

01 · AWARENESS

"Have you created an estate plan?"

02 · REFLECTION

"When was the last time you reviewed it?"

03 · DIAGNOSIS

"Do you know who is named, how assets flow, and whether anything is outdated?"

04 ·
COORDINATION

"Should we involve your attorney, CPA, or other professionals?"

05 · ACTION

"Let's identify the next step — create, review, or update."

FIVE PROSPECTING PLAYS

A short script for the five conversations you should already be having.

The old plan review

"If your estate plan is more than three to five years old, it may be worth reviewing."

The new grandchild review

"Has your plan changed since your family changed?"

The business owner review

"What happens to the business if something happens to you?"

The second marriage review

"Does the plan protect your spouse and your children the way you intend?"

The aging parents review

"Do you know who is making decisions, where the documents live, and how the assets are titled?"

QR CODES FOR LIVE EVENTS

Print-to-pipeline. One scan, one next step.

WHERE TO USE THEM

- Seminars & lunch-and-learns
- Corporate & teacher presentations
- Client appreciation dinners
- Community events
- CPA or attorney partner events

WHERE THE SCAN GOES

- Estate planning landing page
- Checklist download
- Meeting scheduler
- Event registration
- Direct contact form

"Scan to see if your estate plan is still up to date."

THE CLIENT REVIEW REFRESH

The seven questions that turn a quarterly review into a planning conversation.

-
- 01 Do we have copies of your current estate documents?
 - 02 When were they last updated?
 - 03 Who are your trustees, executors, agents, and beneficiaries?
 - 04 Are those people still the right people?
 - 05 Are your major assets titled correctly?
 - 06 Are there assets outside our view that should be considered?
 - 07 Have family, tax, residency, or asset details changed since drafting?
-

THE EXISTING PLAN AUDIT

Most clients haven't read their plan in years. This is the workflow.

- 01 Ask the client to upload or provide existing documents.
- 02 Use Ester® to extract and summarize the plan.
- 03 Review key roles, dispositive provisions, trusts, beneficiaries, and funding.
- 04 Identify questions for the attorney or CPA.
- 05 Use the summary as the basis for the next client meeting.
- 06 Create follow-up tasks for unresolved issues.

ESTER® · ESTATE PLAN INTELLIGENCE

Read complex documents, summarize trusts, and turn extracted data into a one-page review you can put in front of a client.

HELD-AWAY ASSETS, SURFACED

Estate conversations expose what "any other accounts?" never will.

- Outside brokerage accounts
- Real estate holdings
- Life insurance
- Donor-advised funds
- Trust-owned assets
- Retirement accounts
- Business interests
- Bank accounts
- Family LLCs & partnerships
- Individually-titled assets to review

Held-away assets show up when a client is trying to make sure their family is protected — not when an advisor asks if there are other accounts.

THE SIGNING CEREMONY

Turn an administrative moment into a family moment.

WHY IT MATTERS

- Creates a memorable client experience
- Natural way to meet the next generation
- Helps family understand their roles
- Positions you as the family's financial quarterback
- Turns a document task into a relationship moment
- Earns introductions before a crisis happens

PICK THE RIGHT ANGLE

Six headlines that earn the click — pick one and run the campaign around it.

-
- 01 Is your estate plan still up to date?

 - 02 What your family needs to know before it's too late.

 - 03 Estate planning mistakes that create family stress.

 - 04 Preparing the next generation for wealth.

 - 05 What happens to your assets if something happens to you?

 - 06 When should you review your estate plan?

THE CHECKLIST, EVERYWHERE

One asset. Seven surfaces. Every touchpoint connects back.

- Website page

- Social posts

- Signing ceremony follow-ups

- Landing page

- QR code coasters

-

- Email campaigns

- Client review follow-ups

-



Denise Probert, CPA, CGMA · 2nd
I help individuals and teams know how to use accounting & ...
6d ·

[+ Follow](#)

Most people spend April talking about budgeting, saving, and investing.

I did something more.

I reviewed my will and estate plan.

Not because I wanted to but because I needed to.

It forced me to think about decisions most people avoid.

- Who gets what.
- Who is in charge.
- What happens to the things that actually matter - like a farm that has been in my family for generations.

Estate planning isn't just legal, it's financial. And avoiding it doesn't eliminate the cost. It just shifts it to someone else.

In this week's newsletter, I break down what estate planning actually is, why most people delay it, and a few simple steps you can take to get started. If it's been sitting on your list, consider this your nudge.



FinancialExpertEdge

[+ Subscribe](#)

The Financial Plan Most People Avoid (Until It's Too Late)

Denise Probert, CPA, CGMA

11

5 comments

Live Webinar on Estate Planning. Your secret growth strategy




Considerations for Business Owners



Estate Planning for 2025: Flexible Planning Strategies in Uncertain...

The estate exemption has reached an all-time high, but a looming “sunset” at the end of 2025 could drastically reduce it. The results of...

Post Replay on Social Media + Youtube



Frazer Rice ✓ • 1st
Director of Next Vantage (Family Office Services at Next Capital ...
1w • Edited • 🌐

Most modern wills and trusts cover "digital" assets. However, it has become a major task (and risk) for executors and trustees to deal with:


- email accounts
- social media profiles
- crypto wallets
- subscriptions
- miles programs
- healthcare data, (to name a few)

This is true even if these agents have the authority to do so!




This episode of the [Wealth Actually LLC](#) Podcast explores the critical importance of managing digital assets in estate planning, highlighting the challenges of digital inheritance, account access, and cybersecurity risks. [Tatyana Thurston](#) and [Natalia Parker](#) share insights on creating effective digital estate plans, tools, and best practices.

Episode on all formats can be found in the replies.

cc: [Tadas Viskanta](#) [Mr Family Office](#) [Michael Thrasher](#) [Edwin Smith](#) [Tom Burroughes](#) [Joseph Reilly](#) [Hayley Cuccinello](#) [Next Vantage](#) [Heidi Wilson](#)



This Is What Happens to Your Data After Passing
#security #viral
youtube.com

   Jason Largey and 30 others 4 comments • 5 reposts

But What Results Can You Expect with a Webinar?

Over 18–24 months:

- 1,000 people registered
- 40% attended
- 8–10% reached out

Results:

- Generated 9 new client households
- \$11 Million AUM
- \$12,000 ad spend

First webinar ONLY had 10 people on it!

The screenshot shows a LinkedIn event page for a webinar titled "5 Hidden Tax Strategies for Microsoft Employees". The event is presented by Isaac Presley, CFA®, CEO of Cordant Wealth. The event date is Tuesday, April 4, 2023, at 12pm PT. The event is marked as "Event ended". The event details include the date and time (Tue, Apr 4, 2023, 3:00 PM - 3:45 PM (your local time)), the format (Online), and the event link (https://us02web.zoom.us/webinar/register/WN_q3Ow2rOEQrWTigJFCdwKiA). The event is hosted by Isaac Presley and 136 other attendees. The event description lists three bullet points: "How to take advantage of recent tax changes", "5 hidden strategies to help reduce your tax bill", and "How to avoid common tax planning mistakes".

Tuesday, April 4, 2023 @ 12pm PT

5 Hidden Tax Strategies for Microsoft Employees

Presented by
Isaac Presley, CFA®
CEO, Cordant Wealth

CORDANT
Wealth Partners

Event ended

5 Hidden Tax Strategies for Microsoft Employees
Event by Cordant Wealth Partners

Tue, Apr 4, 2023, 3:00 PM - 3:45 PM (your local time)

Online

Event link · https://us02web.zoom.us/webinar/register/WN_q3Ow2rOEQrWTigJFCdwKiA

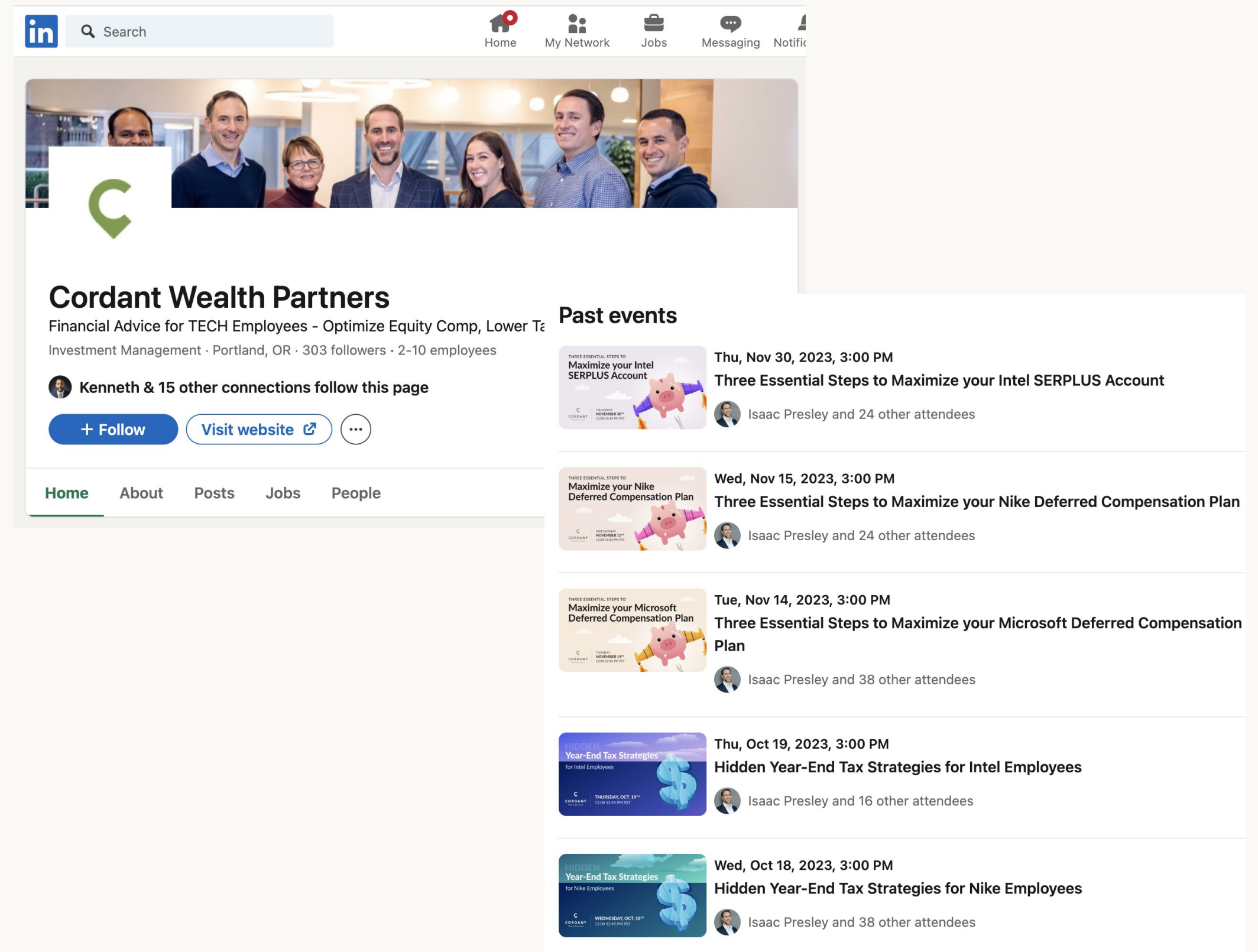
Isaac Presley and 136 other attendees

Share

Tip: Create a LinkedIn Event Page To Invite New Leads

Why This Works:

- Advance Search function
- Can still host via zoom
- You can invite people directly from LinkedIn – without their email address!



FMG's "Do It For Me" Program Helps with Events!

How It Works. We:

- Provide fully fleshed out event
- Create Email templates
- Push Follow up emails
- Create Landing page to collect registrations
- Help with everything you need to know to host a successful event!

Marketing Tip

[Host a "Breaking Down the One Big Beautiful Bill Act" Webinar](#)

Podcast or Webinar Outline

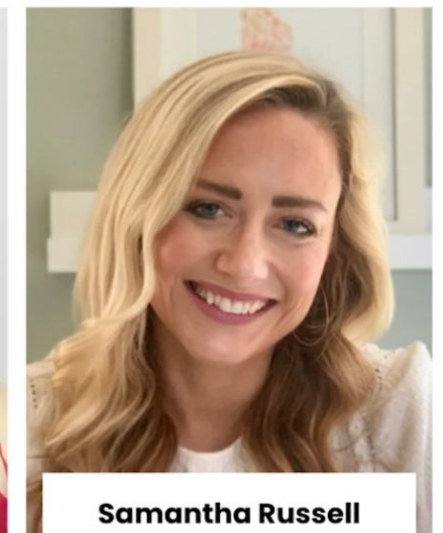
[Breaking Down the One Big Beautiful Bill Act: What You Need to Know](#)

Video Script of the Month

[Breaking Down the One Big Beautiful Bill Act: What You Need to Know](#)



Susan Theder
CMO/CXO, FMG



Samantha Russell
Chief Evangelist, FMG

FMG Creates Slides for You

EXPIRATION DATES FOR CERTAIN PROVISIONS



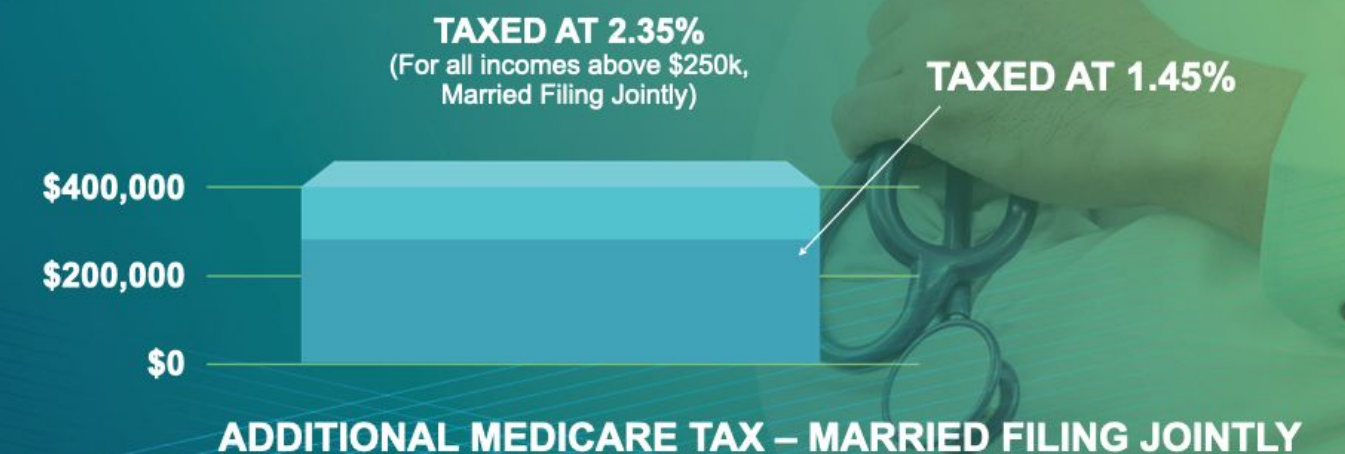
TAX
STRATEGIES

TAX STRATEGIES PRESENTATION

YOUR LOGO
WEALTH MANAGEMENT

This presentation is for informational purposes only and is not a replacement for real-life advice, so make sure to consult your tax, legal, and accounting professionals before modifying your overall tax strategy. Neither BROKER/DEALER nor <<DBA NAME>> provides tax or legal advice. INSERT ADDITIONAL DISCLOSURES HERE.

ADDITIONAL MEDICARE TAX



TAX
STRATEGIES

FMG Built-In Event Tool

FMG's Event Tool makes event management easy! Enjoy the flexibility of pre-built templates and customizable templates and content, and harness the power of automation and registration tracking.

[Learn More >](#)

MARKETING TOOLS



Cancel

Save Draft

Publish

Content Library

Website

Blog

Automated Marketing

Email

Social

Events

Events Intro

My Events

Create Event

Create Event

Create an event based on one of the themes below, or choose a blank event to create an event that's unique to you.

Select An Event Theme

SECURE Act 2.0 Event



Tax Strategies Presentat...



Client Appreciation Event



Check-In Webinar



Shred



Event Info

Event Name *

e.g. Open House

FOLLOW-UP WORKFLOWS

Match the response to how the lead actually engaged.

REGISTERED,
NO-SHOW

Send the replay and a soft re-engagement.

ATTENDED LIVE

Send the checklist and a meeting CTA within 24 hours.

DOWNLOADED
CHECKLIST

Drop into a four-touch educational nurture sequence.

ASKED A
QUESTION

Personal advisor follow-up — not a marketing email.

EXISTING CLIENT
ENGAGED

Schedule an estate review on the next quarterly cycle.

THE 30-DAY LAUNCH PLAN

Four weeks. From a blank page to booked meetings.

WEEK 1

Define

Choose audience
Pick your angle
Define the CTA

WEEK 2

Build

Build the page
Write emails & social
Finalize checklist

WEEK 3

Promote

Email push
Social cadence
Events & COIs

WEEK 4

Convert

Host the event
Run follow-ups
Measure meetings booked

Q&A

**Bring your questions.
Tell us what you'd run on Monday.**

Estate planning isn't just a planning conversation. It's a **trust conversation** — and trust is what creates growth.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1 O: April Fools' Day	2 B: Teaching Teens and ... E: What a \$5 Frappucci... S: Financial Literacy Mo...	3 S: Teaching Young Adul...	4 S: National Stress Awar...
5 O: Easter	6 O: National Autism Awa...	7 A: Monthly Market Insig...	8	9 S: How Much Will Health...	10 S: National Siblings Day	11 S: National Pet Day
12	13	14 B: When Should I Start T... S: Making the Right Call...	15 E: When to Consider Ta...	16 S: Caring for Aging Pare...	17	18
19	20 A: Video of the Month	21 S: Administrative Profe...	22 S: Take Your Child to W...	23	24	25
26	27 S: What is Tax-Loss Har...	28				



Hi there!

Below is your **April 2026 Do It For Me Marketing Calendar**, along with a video from Susan Theder providing a summary of the strategies and highlights. As always, these are each thoughtfully written for you by our most senior thought leaders and reflect your feedback and suggestions. Our goal is to provide you with blogs, emails, and social posts that set you apart from the competition and impress your clients and prospects. We welcome your edits, comments, and suggestions for future months and look forward to executing these on your behalf so you can sit back and relax, knowing your marketing efforts are hitting on all cylinders!

[Click Here to view your April calendar and Video](#)

As a reminder: you are automatically opted-in to all the monthly content

Sincerely,
Your DIFM Marketing Team



**Want to see how FMG
can help you with all this
in 2026?**

Book a 20-minute consult



Questions? Marketing@fmgsuite.com

