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Estate Planning as a Growth Engine

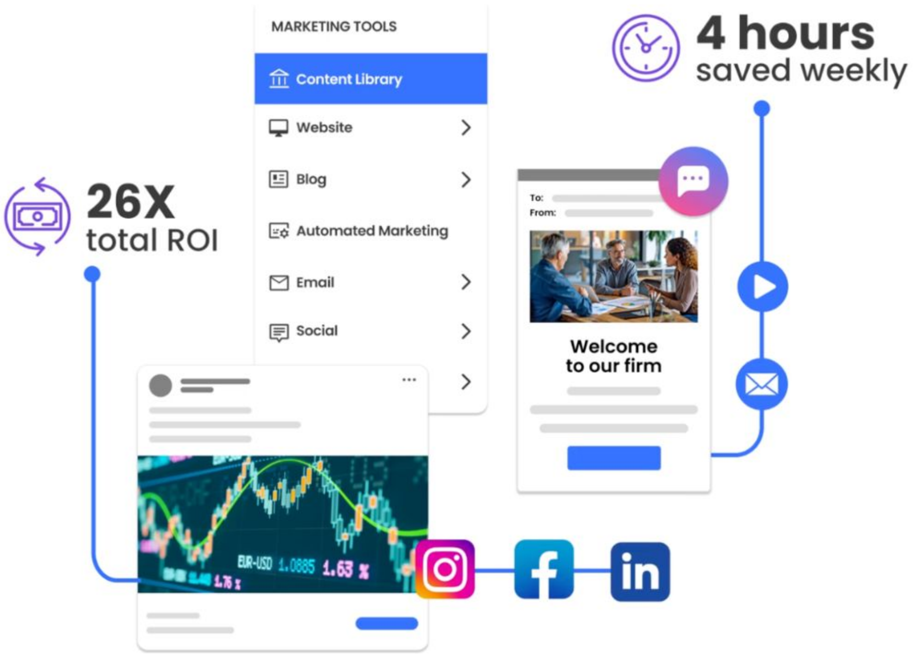
Practical ways advisors generate more referrals, deeper client relationships, and multigenerational growth.

fmg

Your partner for **what's next in advisor marketing.**

FMG helps you keep pace with how clients discover and choose advisors, with the flexibility to build one connected platform or use only the solutions that fit your business.

See How it Works



Fmgsuite.com

Who Is FMG?

One platform for every part of your marketing:

01	CONTENT & ENGAGEMENT **Marketing Suite**	Keeps you visible and consistent. Email, social, content, and automations, all compliance-ready.
02	DIGITAL PRESENCE **Website Suite**	The foundation. Where prospects validate, referrals land, and AI search surfaces your expertise.
03	CLIENT TEXTING **Messaging Suite**	Lets you text clients compliantly. Built for financial advisors, modern new mobile app.
04	MANAGED EXECUTION **Do It For Me**	Removes the execution burden. A dedicated Concierge runs marketing month after month.
05	TRUST & SIGNALS **Testimonials**	Compliant reviews and social proof, built into the platform and surfaced on websites and Google.
06	CONTENT MARKETPLACE **Institutional Intelligence**	Carrier, asset manager, and association expertise published in the your voice.
07	PARTNER PROGRAM **FMG Connect**	Integrates with all your preferred solutions saving you time and improving execution.

One login · Built in compliance workflow · CRM integrations · Built only for financial advisors

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Platform Solutions Resources Company Pricing

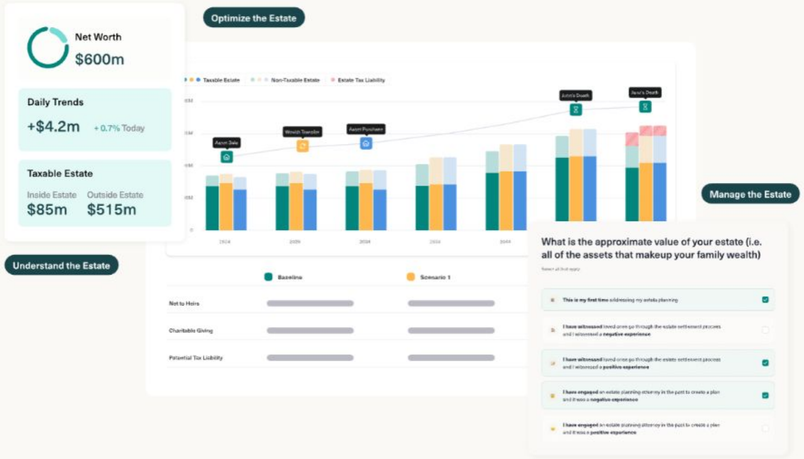
Login

Get a Demo

Unlock the Full Power of Estate Planning

Wealth.com empowers advisors to keep clients for life, strengthen generational ties, and bring estate planning fully in-house.

Book a Demo →



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Today, We'll Show You How To:

- Make estate planning visible
- Turn visibility into better prospect conversations
- Make estate planning a repeatable motion
- Expand those conversations into families and referrals

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The Opening Ask

1. Take out your phone.
2. Search your firm name + estate planning

If you can’t find it, neither can your next client.

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WHEN A REFERRAL MEETS A SEARCH · ILLUSTRATIVE

What the prospect asked

ChatGPT
GPT-4o

I was referred to Russell Financial Group. Tell me how they help with estate planning.

ChatGPT

Russell Financial Group is a registered investment advisor in your area. Their site describes wealth management and retirement planning services.

I couldn't find anything published about how they handle estate planning — no service page, no articles, and nothing about whether they draft documents or refer that work out.

You may want to ask them directly. Their public materials don't cover it.

Ask anything...

What the model went looking for

Signals it searched for

and did not find anywhere public

- ✕ A page describing their estate planning services
- ✕ Answers about wills, trusts, and beneficiaries
- ✕ What they draft versus what they coordinate
- ✕ A named attorney or partner relationship
- ✕ Content updated in the last eighteen months
- ✕ Reviews that mention legacy or estate work

What would have changed the answer

One page that says who it's for, what's included, what gets drafted, and who does the drafting.

The referral opened the door. What the model found decided whether they walked through it.

A referral gets you considered. Published answers get you recommended.

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ESTATE PLANNING AS A DISCOVERY ENGINE · ILLUSTRATIVE

The life-stage question

ChatGPT
GPT-4o

My wife and I are in our 50s. We need an advisor who can manage our investments, build a real plan, and help us figure out how to leave things to our kids.

ChatGPT

Firms that handle all three usually publish estate planning content alongside investments.

Three in your area:

- Cornerstone Financial
- Harbor Wealth Partners
- Meridian Advisors

Ask anything...

The follow-up

Claude
Anthropic

Can Cornerstone actually help us draft the documents, or do they just refer us out?

Claude

From their published pages:

- Estate planning FAQ answers this directly
- Names the attorney they work with
- Spells out what they draft and what they hand off

The other two firms don't address it anywhere.

Ask anything...

The shortlist

Gemini
Google

So which firm should we call first?

Gemini

	Cornerstone	Harbor
Estate page	Dedicated	None
Wills/trusts	12 FAQs	Not found
Drafting	Explained	Unclear
Updated	This month	2 yrs ago

Gemini recommends:
Cornerstone Financial

Cornerstone answered the question in public first.

Ask anything...

The estate planning questions you answer in public are the ones AI repeats back to prospects.

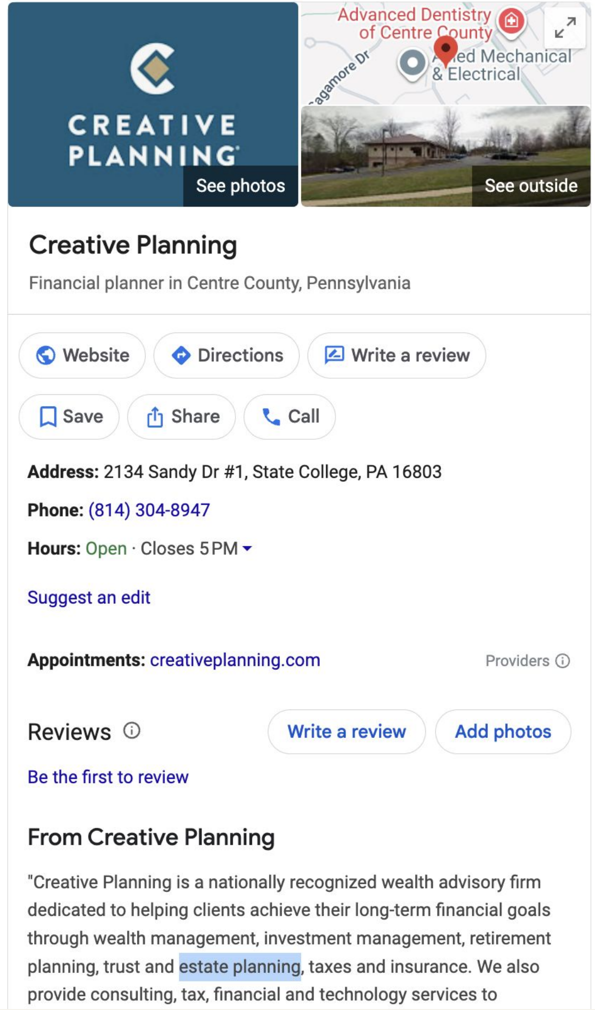
Do This 1st!

ACTION ITEM: Google Business Profile

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

SUGGESTED SERVICE DESCRIPTION

We help clients organize their financial life, review estate planning needs, and coordinate with legal and tax professionals so their wishes are clearly documented.



Next, Your Website. It's either helping show you do estate planning

...or keeping you from being found for prospect looking for this service

THE ESTATE PLANNING PAGE

What every advisor's estate planning page should answer:

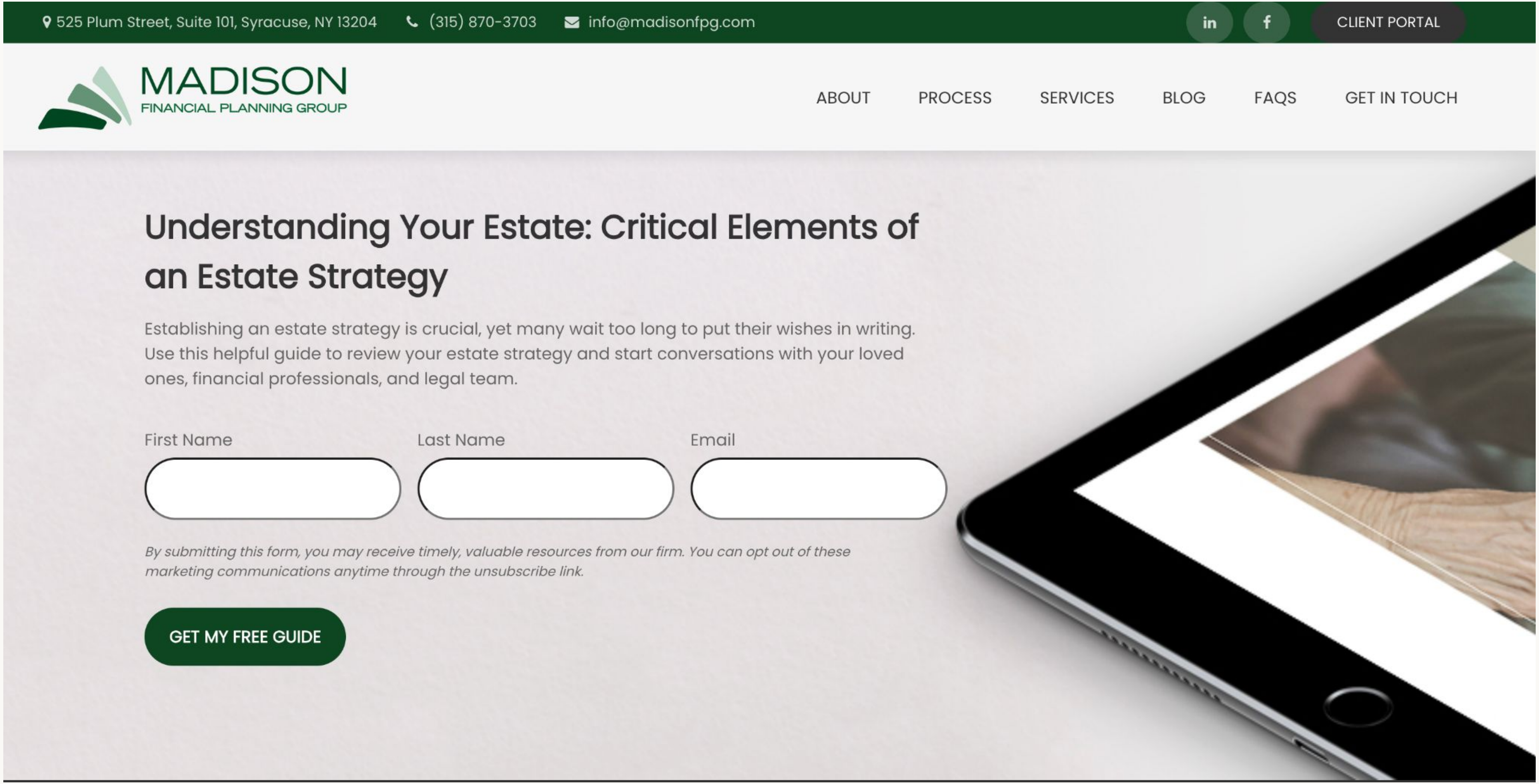
- Who the service is for
- How you coordinate with attorneys & CPAs
- FAQs (good for AI search)
- When someone should review
- Common triggers for a review
- Earned media mentions

PRIMARY CTA

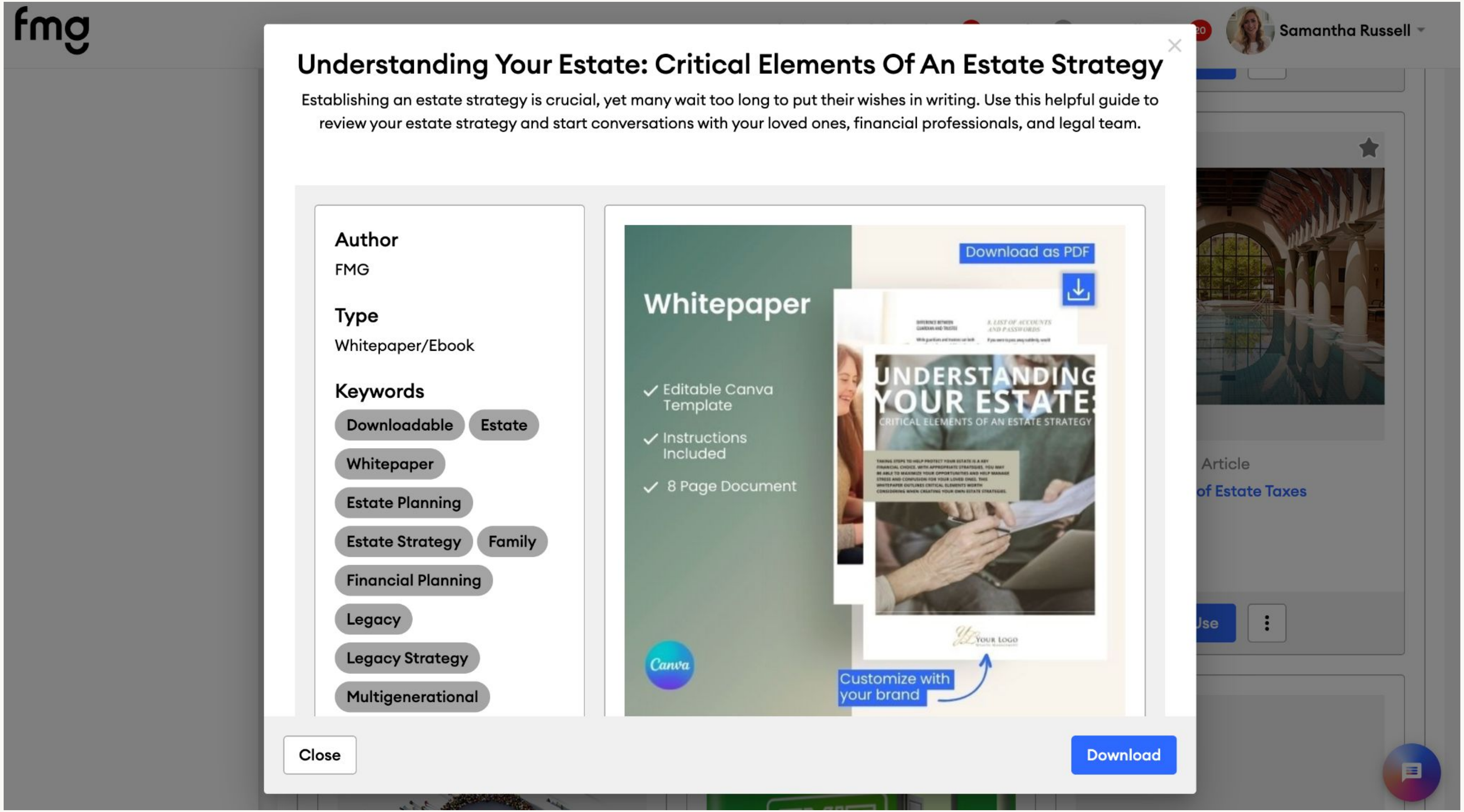
Schedule an Estate Plan Review

SECONDARY CTA

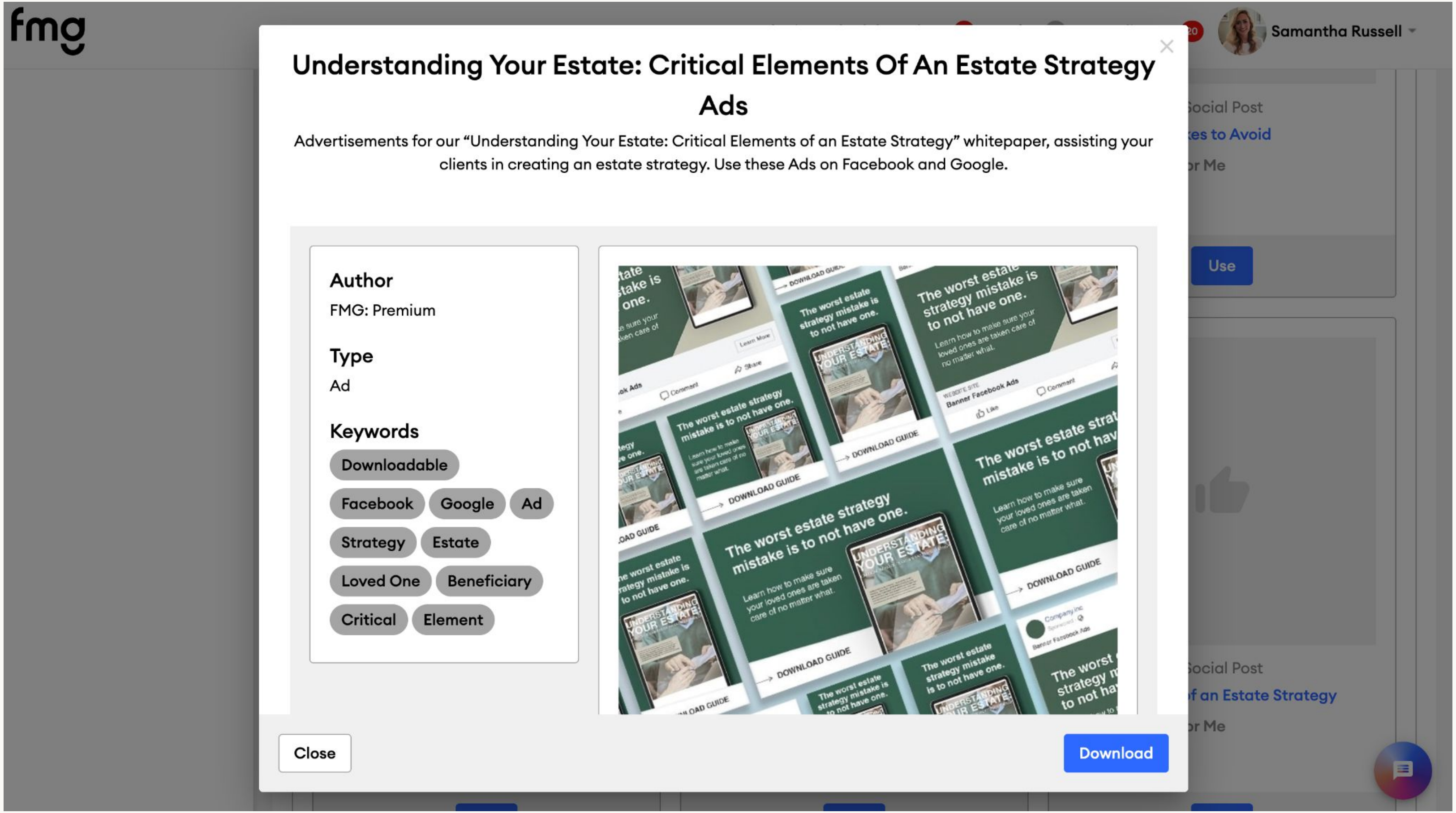
Download the Estate Planning Readiness Checklist



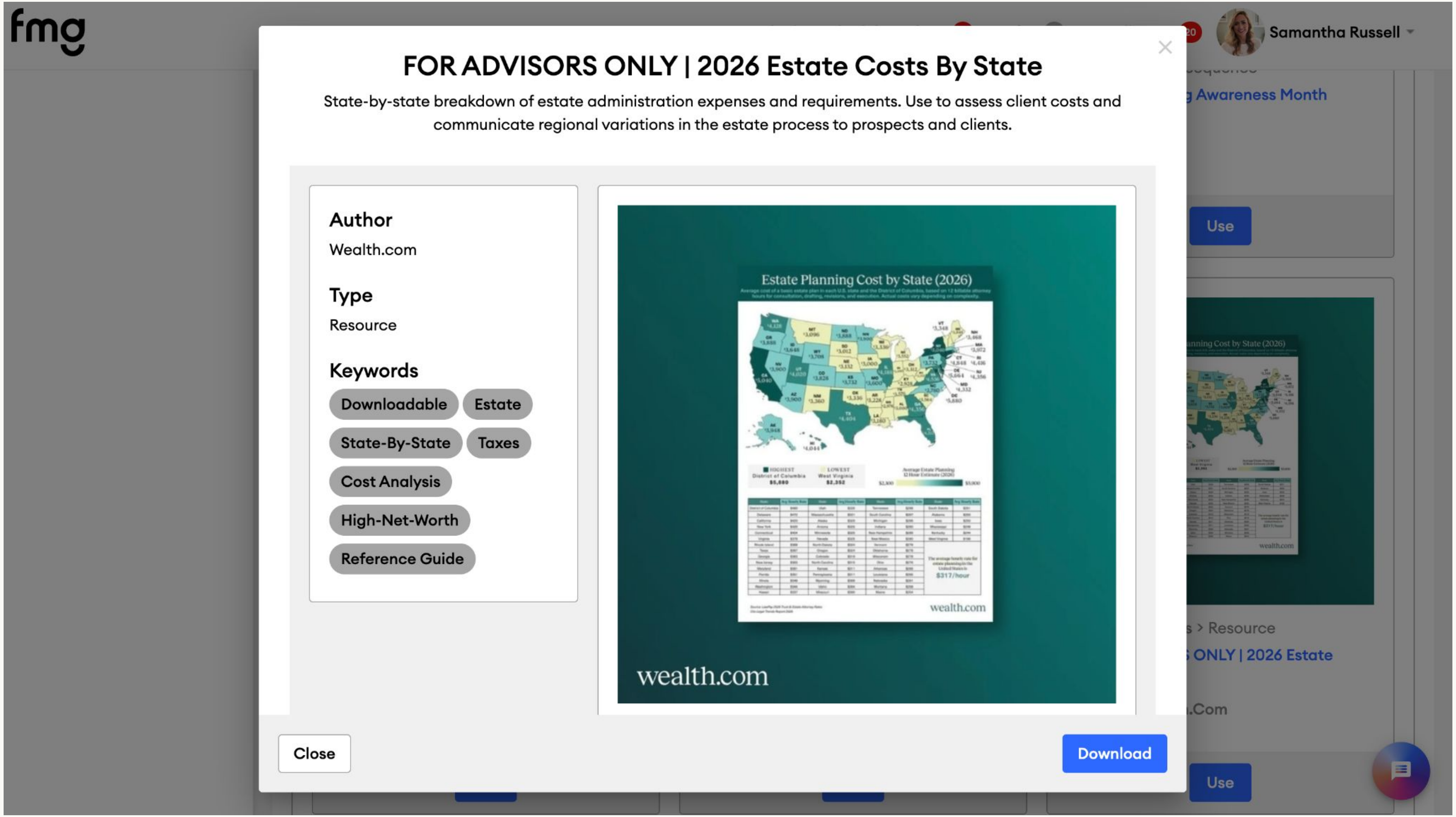
Example: Estate Planning Download on Madison' Financial Planning Group Website (website & content by FMG)



Find Ready-To-Use Gated Content In FMG’s Content Engine.



We even have pre-made ads you can customize and run to target people looking for estate planning!



NEW! Wealth.com & FMG partner to bring you institutional intelligence - pieces specific for advisors to use directly with clients and prospects. Brought to you by wealth.com, in the FMG Content Engine

The Estate Planning Marketing Stack

01 Website

02 Google Business

03 Checklist or Article

04 Email

05 Social

06 QR Codes

07 Review Meetings

Harford Financial Group
Retirement Income Specialists

About Us | Who We Serve | Services | Resources | Contact Us | Client Login

Estate Planning Is More Than Documents: It's Communication

Bryan Angelilli / *August 11, 2026*

Estate Planning Is More Than Documents: It's Communication

A few years ago, we worked with a retired couple whose adult daughter lived in another state. From early on, we included her in meetings through video conferencing. Over time, she became familiar with her parents' finances: where accounts were held, how they were structured, and who to contact. When the husband later became seriously ill and passed away, his wife was understandably overwhelmed. But because their daughter was already part of the process, she was able to step in immediately to manage bills, coordinate with advisors, and handle administrative tasks. That preparation allowed the family to focus on what mattered most: grieving and supporting one another, rather than scrambling to piece together financial information.

There are hidden risks in "private" estate planning. Many retirees believe they've done the right thing by putting a will in place and naming beneficiaries on retirement accounts. But when those details are kept private, transitions can become confusing and stressful for loved ones, especially during an already emotional time. A lack of communication can lead to difficulty locating accounts and documents, delays in decision-making, and unnecessary stress or even family conflict. Clear, practical conversations today can make a significant difference later, both financially and emotionally.

When working with clients, we consistently review primary and contingent beneficiaries and update them as needed. What often starts as a simple administrative review quickly opens the door to deeper planning conversations. Clients begin asking about how assets should be structured to align with their legacy goals, whether Roth conversions should be considered, whether a trust would make sense, and whether there are opportunities for strategic gifting. These discussions naturally expand beyond investment accounts to include estate planning for their pensions, annuities, life insurance policies, vehicles, home, and payable-on-death (POD) accounts.

One key benefit of properly naming beneficiaries is that these assets typically transfer directly to the individual or institution, often avoiding probate and providing faster access when it's needed most.

Many families are surprised to learn about the "10-year rule" for inherited retirement accounts. Under current law established by the SECURE Act, most non-spouse beneficiaries must fully liquidate inherited retirement accounts within 10 years. This legislation has real implications such as accelerated taxable income and potentially higher tax brackets. Proactive planning and communication, especially when coordinating beneficiaries and tax strategies, can help mitigate these effects

BrokerCheck by FINRA

Example of a Blog Post on Hartford Financial Group's Website (FMG client) all about Estate Planning

Many people believe having a will and named beneficiaries is enough. But keeping your estate planning "private" carries hidden risks.

When transitions happen without prior communication, loved ones are often left scrambling. They face delays, missing paperwork, and unnecessary stress during an already emotional time.

That is why estate planning isn't just about documents—it's about communication.

In my latest blog, I share simple, actionable steps to protect your family, including:
1️⃣ Why simple conversations today reduce emotional and financial stress tomorrow
2️⃣ How the SECURE Act's 10-year rule works (which requires most non-spouse heirs to empty inherited retirement accounts within 10 years, potentially triggering higher taxes)
3️⃣ How to put together a 1-to-2 page "family financial briefing" with key contacts and account details
4️⃣ The benefits of introducing your adult children to your financial advisor early

Click below to read the full article and see how proactive planning gives your family confidence before it's needed 👇

Estate Planning Is More Than Documents: It's Communication
Bryan Angelilli NSSA®

Don't just post your blog as a link to social media.

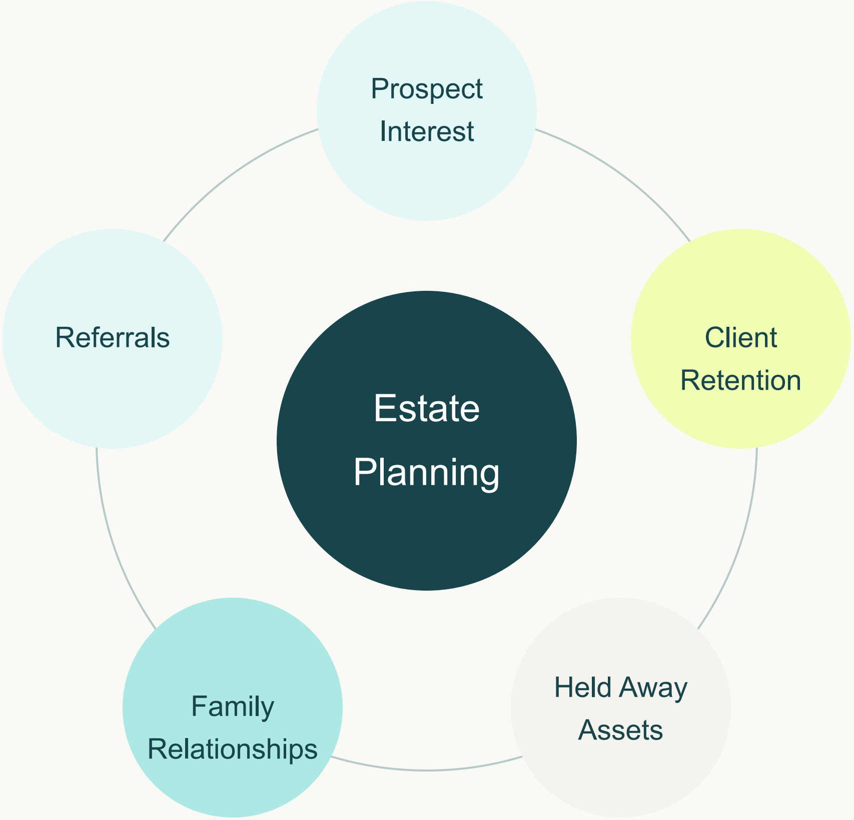
Summarize key points. This is called "Zero Click Content".

Want to see how FMG can help you with your Marketing?

Scan to connect
with our team and
request a demo!

Stop Thinking of Estate Planning as a Service

Instead think of it as...



Every Life Event Is An Opportunity

18th Birthday

Marriage

Baby

Inheritance

Business Sale

Retirement

Move States

Death in Family

Rather than marketing randomly, show up when life changes.

The Estate Planning Conversation Ladder

1	Awareness	Have you created an estate plan?
2	Recency	When was it last reviewed?
3	Understanding	Do you know who is named and how assets flow?
4	Coordination	Are beneficiaries, titling, and professionals aligned?
5	Action	What is the next step?

Five Prospecting Conversations

Exactly what advisors can say.

- Old estate plan
- New grandchild
- Business owner
- Second marriage
- Aging parents

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What clients say

We Already Have an Estate Plan

Ask:

- When was it signed?
- What has changed since then?
- Are the right people still named?
- Are assets, beneficiaries, and titling aligned?

Existing documents are the starting point for a review.

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One question that changes every client review

If something happened tomorrow...

Would your family know exactly what to do?

Make Estate Planning a Standard Review Lane

Every review should answer:

1. Do we have the current documents?
2. When were they last reviewed?
3. Are the key people still right?
4. Are beneficiaries and titling aligned?
5. What has changed?

Collect → Summarize → Review → Coordinate → Track

Estate Reviews Uncover What Performance Reviews Never Will

Estate review

- Held-away assets
- Beneficiary issues
- Real estate
- Insurance
- Business interests

The Family Milestone Program

01	02	03	04	05	06
Turning 18	Marriage	First Home	Children	Grand children	Retirement

Gift estate planning moments throughout life.

The 18th Birthday Gift

One story advisors can tell in any review meeting.

The moment

A client's child turns 18.

The gift

An Advance Healthcare Directive.

The words

"Congratulations! One thing most parents don't realize..."

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Never Ask For Referrals Again

“Who’s one person you care about that deserves this same clarity?”

Then explain gifting.

The Signing Ceremony

- Meet heirs
- Meet trustees
- Meet executors
- Create memorable moments
- Become the family advisor

Your 30-Day Action Plan

Week 1

Website

Week 2

Marketing

Week 3

Client Reviews

Week 4

Family Milestone Program

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Estate planning is no longer paperwork.

It's how advisors:

Win trust

Stay relevant

Meet the next generation

Create referrals

Grow for decades

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Q&A

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Thank You