WealthCounsel®

PRACTICE ESSENTIALS

A Foundation in Client-Centered Estate Planning

The Practice Essentials Program is Just One Key Offering Within Our "Five-Star Practice Solution™"

The attorney's blueprint for building a successful estate planning practice.

Practice Essentials is a two-year program for attorneys who are committed to investing the necessary time and resources to building a solid foundation for a successful career in estate planning.

PROGRAM OBJECTIVES

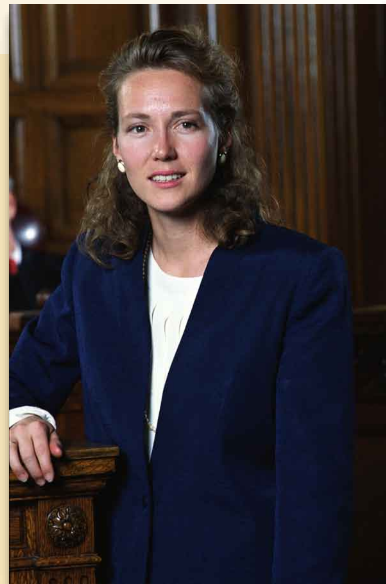
- ✓ **Bridge legal theory with practical application.**
- ✓ **Boost your competence and confidence.**
- ✓ **Produce legally sound estate plans.**
- ✓ **Attract a broader base of clients.**
- ✓ **Earn more income.**

At the conclusion of the ***Practice Essentials*** program, participants will be equipped with all the necessary tools and legal strategies to competently serve the needs of a broad base of clients, as well as proficiently manage the day-to-day operations of the business.

Who should participate in this program?

- Attorneys who are transitioning from another area of law, or who are new to the field of estate planning
- Attorneys who are committed to strengthening the foundation for their existing estate planning practice

Core Curriculum



Precursor
- Setting the Stage: Estate Planning as a Career
- Team Introduction to Estate Planning
- Time Management Series

The Law
- EP 100 - The Basics of Estate Planning
- EP 101 - Drafting RLTs, ILITs, and Ancillary Documents
- EP 102 - Presenting legal concepts to clients
- EP 103 - Essentials of Charitable Planning, Irrevocable Trusts, Retirement and Business Planning

Technology

Software installation, WealthDocs™ Training, WealthDocs™ Asset Transfer System training, Word/Excel/Adobe

Business Development

The essentials, niche markets, pet trusts, same sex partners, special needs, trust administration, the building blocks of a strong business plan.

Practice Management | Client Development

Philosophy, goals and objectives, the law as a business, budgeting, the team, before becoming a client, value pricing, the initial meeting, the trust presentation, funding, client retention, trust administration, database management, disaster planning, and more.

Practice Essentials Library

Two-volume set of practice tools, forms, presentations, etc.

WealthCounsel Support Systems | Tools | Technology:

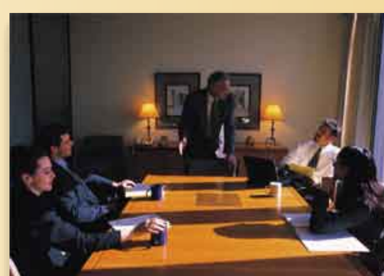
Practice Management Library (SettlementCounsel, and Wyoming LLC), website, online resources, software support, legal support, legal support blog, member services, continuing legal education, professional news updates, knowledge base, 24/7 library, listservs, state and regional forums, writing/speaking opportunities, Marketplace online shopping, *The Quarterly Counselor Newsletter*, Advisors Forum, ElderCounsel, Certified Estate Planning Assistant (CEPA) program; Rainmakers Program, annual estate planning and wealth management conference known as: *Planning for the Generations - The Nation's Premier Symposium for Estate, Elder Law, & Financial Professionals.*

"In addition to helping attorneys build a *Practice With Purpose,* Practice Essentials delivers and reinforces the essential knowledge required to competently address a wide range of client scenarios."

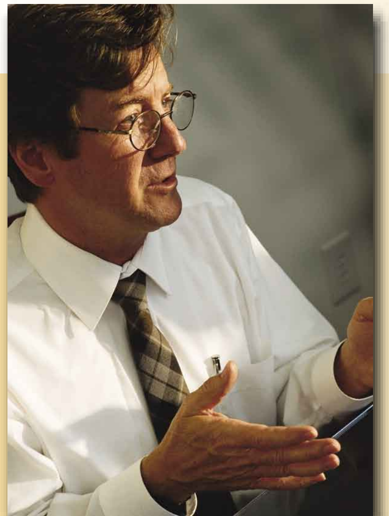
--Laura Wilson, Exec. Director
WealthCounsel, LLC

Course Structure

Year One:
- Estate Planning 100: Building/Sustaining an Estate Planning Practice
- Estate Planning 101: Understanding & Drafting RLTs, Ancillary Documents and ILITs
- Monthly Lecture (teleconference/webinar)
- Monthly Study Group (teleconference)
- Study Group Facilitator
- Practice Library, Volume 1



Year Two:
- Estate Planning 102: Effectively Presenting Estate Planning Concepts to Clients
- Estate Planning 103: Essentials of Charitable Planning, Irrevocable Trusts, Retirement and Business Planning
- Monthly Lecture (teleconference/webinar)
- Monthly Study Group (teleconference)
- Study Group Mentor
- Practice Library, Volume 2
- Graduation: *Planning for the Generations - The Nation's Premier Symposium for Estate, Elder Law, & Financial Professionals*



What is *Practice Essentials*?

Practice Essentials, available exclusively for members of WealthCounsel, is a two-year program designed to assist attorneys who are new to the field of estate planning or those seeking to build a stronger foundation for their current practice.

Practitioners will benefit from a combination of the program's relevant legal-technical education, practice-building strategies, and mentoring from some of the nation's leading estate planning attorneys who are members of WealthCounsel.

The curriculum combines live, instructor-led CLE workshops; a series of teleconference lectures; study groups; and mentoring -- all of which are designed to deliver and reinforce the essential knowledge required to competently address a wide range of problem-solving strategies.

- ✓ Features live CLE courses combined with document-centric instruction in drafting estate plans using WealthDocs.
- ✓ Provides specific instruction in practice-building, practice management, and client development strategies.
- ✓ Delivers lectures via teleconferences or webinars on a wide range of legal-technical and practice management topics.
- ✓ Facilitates collaborative learning through study groups and mentoring, along with self-study assignments.

"Practice Essentials is different from other estate planning CLE courses, because it is taught by experienced attorneys who recognize that your goal is to bridge legal theory with relevant strategies that can be implemented immediately in your practice."

-- Matt McClintock, J.D.
Course Instructor
WealthCounsel, LLC

Why the Need for the Program?

Estate planning continues to be a growing field of law as more and more attorneys respond to the retirement planning needs of aging baby boomers. However, many estate planning attorneys are solo practitioners or operate in small firm environments where there is minimal opportunity to benefit from the collaboration and mentoring that typically occurs in larger organizations.

Furthermore, WealthCounsel provides solo and small firms the added benefits of practice management strategies; tips on managing back office operations; and IT and other technical assistance relating to software support.

WealthCounsel, an organization that is committed to a client-centric approach to estate planning, was founded on the principles of competence, collaboration, and a meaningful sense of professional community. Therefore, we recognize the need to offer our knowledge to the growing field of practitioners who share our philosophy of collegiality and who seek to benefit from the expertise of other practicing attorneys.

Please call us for pricing and WealthCounsel memberhip application form.
888-659-4069, ext. 819.

The WealthCounsel

Five-Star Practice Solution™

WealthDocs Automated Document Drafting System

- HotDocs-Based. Complete document creation system in a Windows environment using Miscrosoft Word
- Regularly Updated. Comprehensive.
- Integrates with WealthDocs Asset Transfer System (WDATS)
    - WDATS works natively with WealthDocs answer files. Helps you manage any asset transfer task.
    - WDATS facilitates transfer from any person, trust or entity to any person, trust or entity
    - Integrates with Gillette Estate Management System (GEMS)
- Built-in system resources and web-based document annotations provide relevant explanations
- Includes basic and advanced document assembly systems
    - Revocable Trusts
    - Wills
    - Ancillary documents: pour-over wills, powers of attorney, property agreements, etc.
    - Irrevocable Trusts
    - Retirement Planning-Specific Trusts
    - Charitable Trusts and Foundations
    - Family Limited Partnerships and LLCs
    - Split-Interest Trusts (QPRTs, GRATs)
    - Third-party Special/Supplemental-Needs Trusts
    - Business Succession documents
    - Many state-specific statutory documents

Collaborative Community of Attorneys

- Annual Conferences and Regional Events
- Membership directory of attorneys in all 50 states (to promote co-counseling opportunities)
- Listservs
- Regional and state forums

CLE, Team Training, Practice Management Courses

- Relevant Estate Planning Curriculum (Fundamental through Advanced Courses)
- Practice Essentials: A Foundation in Client-Centered Estate Planning (a blueprint for building a successful practice)
- Certified Estate Planning Assistant (CEPA) Program
- Legal/Practice Management/Building Courses offered on CD-ROM at member rates
- Professional News Updates (a summary of the latest legislative changes, court cases, IRS rulings and more)

Practice Resources & Systems

- Practice Management Library
    - SettlementCounsel -- The WealthCounsel Estate Settlement System
    - The Wyoming Close LLC Kit
- Online Resource Center Knowledge Base (available to members 24/7)
- Leimberg Newsletter and LISI Professional Resource Library
- The Quarterly Counselor Newsletter (providing publishing opportunities for members)
- Speakers Bureau (providing exposure and speaking opportunities for members)
- Website Referrals: Consumers & Financial Professionals sections of website (providing client referrals to members)
- Professional alliances, resources, and services (Advisors Forum, ElderCounsel, etc.)

Service & Support

- Highly-responsive customer/software service support team
- WealthDocs/WDATS training
- Legal Support Blog
- Technical Support Blog

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WealthCounsel®

Leading Provider of Tools & Intelligence to the Estate Planning Community

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