

THE ESQUIRE ACADEMY

Advanced Training Program- Curriculum

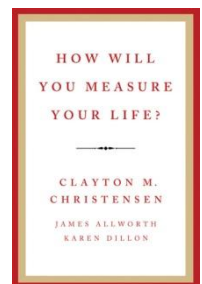
Week 1: YOUR GOALS

- Program Orientation- Why use mentoring/ coaching?
- Goal Setting- SMART goals
 - Specific- building their vision, effective vision boards
 - Measurable- How to set proper benchmarks for their goals
 - Attainable- What is realistic and appropriate for their current situation, plan of action
 - Reported- Accountability Plan, using an accountability partner
 - Timed- when to reach the goal by, establishing a timeline
- Review and vision of what you want your practice to become- Before/ After

Assignment: Develop a description/ statement of where your practice is now, and a vision statement of where you want it to be after effectively applying the principles from this program.

Challenge Contest: Read your business plan, vision board, or affirmations daily; (one point for each time you focus on your vision- morning and night)

Recommended Reading: How Will You Measure Your Life? By: Clayton M. Christensen



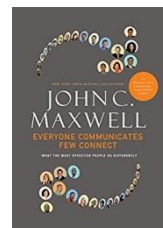
Week 2: YOUR MESSAGE

- 30 Second Commercial
 - What it is
 - Why to use it
 - Where to use it
 - How to create one
- 5 Minute Talk
 - What it is
 - Why to use it
 - Where to use it
 - How to create one
- 20 Minute Presentation
 - What it is
 - Why to use it
 - Where to use it
 - How to create one

Assignment: Create a 30 Second Commercial, 5 Minute Talk, and 20 Minute Presentation

Challenge Contest: Use your elevator pitch in networking as many times as possible;
(one point for each time you share your elevator pitch)

Recommended Reading: Everyone Communicates, Few Connect By: John C. Maxwell



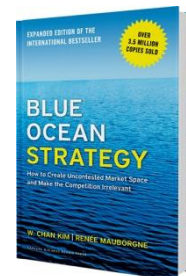
Week 3: YOUR SERVICES

- DIY Packages
 - Scope of Services- What it is and what is included
 - Pricing
- Comprehensive Packages
 - Scope of Services- What it is and what is included
 - Pricing
- Complex Packages
 - Scope of Services- What it is and what is included
 - Pricing
- How to assess, quote, and place value on a case

Assignment: Explain the pricing structure and options to 3-5 Allied Professionals/Referral Sources

Challenge Contest: Gather as many potential referrals or leads from those conversations as possible (one point for each lead)

Recommended Reading: Blue Ocean Strategy By: W. Chan Kim



Week 4: YOUR STORY

- Firm Culture
 - Structure of the Firm
 - Values of the Firm
 - Approach to Planning
 - Your role in the Firm
- “The Why” of Inter Vivos
 - Future of the Industry
 - The Vision of becoming the first global estate planning firm
 - How we are transforming the industry
- Effective use of stories and questions
 - Using stories to close sales
 - Using stories to address concerns
- Emotional Sales
 - Connecting emotionally in the sales process
- Using Your WFG Story
 - How to develop and tell your story of becoming a member of Inter Vivos

Assignment: Develop and share your story with 3-5 Clients, Allied Professionals, or Networking Contacts

Challenge Contest: Share your story in as many conversations or presentations as possible;
(one point for each conversation or presentation)

Recommended Reading: Made to Stick By: Chip Heath and Dan Heath



Week 5: YOUR CLIENTS

- The Sales Process
 - How our Sales Pipeline works
 - Knowing your Ratios
 - Closing as Helping
 - Always get a Commitment
 - How to use the CRM system
 - Co-Counseling Scenarios
- Effective Networking
 - Developing a Top 10/20 list of Allied Professionals
 - How to Find, Identify, and Train Allied Professionals
 - Great, Good, Gone
- Social Media Marketing
 - The Social Media Marketing Process
 - Developing Content
 - The Social Media Channels we use
 - The Results we want and how to follow up with them
- LegacyShield On Call/Review Process
 - How to convert calls to conversations
 - How to convert conversations to clients
 - How to identify which clients we want to work with

Assignment: Be “On Call” at least once, Post at least one relevant post in a social media outlet, Network with at least one potential Allied Professional outside of WFG

Challenge Contest: Set as many consultations or get as many interested potential clients as possible; (one point for each potential client)

Recommended Reading: The 12 Week Year By: Brian P. Moran



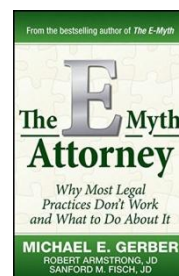
Week 6: YOUR PRACTICE

- Becoming an Estate Planner
 - Seeing Yourself as a Professional
 - The Difference between a Litigator and a Planner's Mentality
 - Core Values of an Estate Planner
- Complex Estate Planning
 - Constantly be Learning
 - Don't be Intimidated by Complex Conversations
 - Learn to sell Specialized Planning
- Inter Vivos Resources and Channels
 - Benefits of Membership in Inter Vivos
 - The Value of a Large Firm
 - Strategizing with other Firm Members
 - Improving Your Craft
- Proper Attitude and Activities
 - Mindset
 - Priorities for Activities
 - Scheduling Your Day

Assignment: Schedule Your Week, Month, and Each Day's Activities

Challenge Contest: Follow your daily schedule as closely as possible;
(one point for each day you follow your schedule 90% or better)

Recommended Reading: The E-Myth Attorney By: Michael E. Gerber



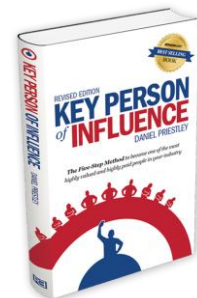
Week 7: YOUR SPECIALTY

- Why Specialize?
 - Doubling Your Value
 - Differentiating Yourself in the Marketplace
- Selecting a Specialty
 - Your Personality and Passion
 - Becoming Obsessed
- Developing Your Specialty
 - Learning Your Specialty
 - Writing/ Developing Specialty Content
 - Teaching/ Presenting Your Specialty
- Marketing Your Specialty
 - Identifying Affinity Markets
 - Online
 - Events
 - Networking
 - Allied Professionals
 - Boards/ Community Involvement

Assignment: Select your specialty and develop a long term marketing plan for it

Challenge Contest: Schedule as many specialty meetings with clients, referral sources, or presentations as possible; (one point for each meeting completed in the week)

Recommended Reading: Key Person of Influence By: Daniel Priestley



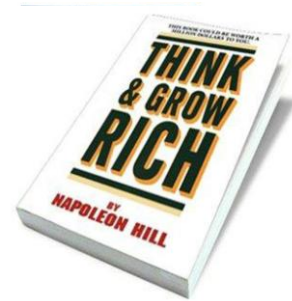
Week 8: YOUR VISION

- Advanced Planning (AP) Programs
 - The Value of Complimentary Professions
 - Combining Advanced Financial Planning with Estate Planning
- New Market Development
 - The Value of Identifying and Approaching New Markets
 - Helping the Firm Capitalize on BIG Opportunities
- Attorney Management & Development
 - The Value of Becoming a Managing Attorney
 - Managing and Developing an Office and Region

Assignment: Develop and Write your 5 year vision statement for personal life and your practice, also identify and invite another attorney to look into joining the Firm.

Challenge Contest: Identify and invite as many other attorneys to join the firm as possible;
(one point for each attorney invited)

Recommended Reading: Think and Grow Rich By: Napoleon Hill



Weeks 9-12: YOUR TRANSFORMATION

Guidelines for Becoming a Specialist/ Senior Counsel at Inter Vivos- You Must:

- Have completed Esquire Academy
- Have met the Firm's minimum standards and production for at least 3 months
- Have Been Involved with at least 10 cases within your specialty during your career
- Have Personally Handled at least 5 cases within your Specialty in the last 3 months
- Have a Top 10 Referral Source List identified within your Specialty Area
- Be familiar with and able to identify at least 10 articles/ resources related to your Specialty and describe why they are valuable references
- Be familiar and comfortable with the talking points related to your chosen Specialty

Guidelines for the Annual Income and Shield Bearer Recognition:

- For Full Time Attorneys
 - Handle 100 complete estate planning cases during your time with the Firm
 - Earn \$100,000 in take home revenues in a calendar year
 - *(Will receive a pin for each year \$100k income is reached)*
- For Part Time Attorneys
 - Handle 50 complete estate planning cases during your time with the Firm
 - Earn \$50,000 in take home revenues in a calendar year
 - *(Will receive a pin for each year \$50k income is reached)*

Assignment: Continue the activities assigned as challenge contests throughout the rest of the 12 weeks

Challenge Contest: Meet or exceed the Guidelines for Becoming a Specialist/ Senior Counsel



Esquire Academy Assignment-Week 3

Please list the names of 5 referral sources.

1. _____

2. _____

3. _____

4. _____

5. _____

Esquire Academy Assignment-Week 5

Day and time that I am on call _____

Please describe the social media post you created.

Who did you network with this week?

Why were they a good resource?

Esquire Academy Assignment-Week 6

Please Describe you plan for a month.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday

Please Describe you plan for a week.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
