

Estate & Legacy Planning

Implementation Guide



MAGELLAN
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Campaign Overview

Who This Guide Is For

This guide is designed for advisors who recognize that some of the most important conversations they have with clients are often postponed.

You have most likely sat across from clients who believe their estate plan is complete because documents were signed years ago. On the surface, everything appears in order. The binder is in place. The attorney has been paid. The topic feels closed.

Then a simple question changes the conversation. If something were to happen, who would know what to do first? Where would your family begin? Who would be making decisions, and how confident would they feel?

That is where this campaign lives.

As an advisor, your role is not to replace legal professionals. Your role is to bring structure, clarity, and guidance to a part of planning that is often overlooked once documents are completed. This guide is designed to help you lead those conversations in a way that is practical, consistent, and aligned with how you serve your clients every day.

How To Use This Guide

Use this document as your execution playbook. It explains how to position the topic, when to introduce each asset, and how to move a client from awareness to a planning conversation.

This campaign is not about legal documents alone. Your role is to guide clients through readiness, organization, and family clarity through simple, structured conversations, supported by the provided tools.

Campaign Purpose

The purpose of this campaign is to help clients evaluate whether their estate planning is actually usable and understood, not simply completed.

Many clients believe they are finished because documents were signed. This campaign could help to uncover whether those plans are organized, current, and clear for the people who will eventually rely on them.

Core Objective For Advisors

Your objective is to create planning conversations that could help identify gaps in:

- Estate organization
- Beneficiary alignment
- Decision clarity
- Family communication

The goal is not to sell documents. The goal is to bring awareness and improve readiness.

Key Message To Deliver

Use consistent language across conversations, media, and meetings:

- Estate planning is not only about documents. It is about whether your family would know what to do.
- A completed plan is not always the same as a ready plan.
- Preparation can make things easier for the people you care about.

How To Position This Campaign

Position this topic as a practical planning review, not a legal discussion.

You are not acting as an attorney. You are helping clients evaluate whether their current plan is organized, up to date, and understandable.

Avoid leading with death or worst-case scenarios. Focus on clarity, preparation, and reducing confusion for family members.

Assets Included And How To Use Them

1. ESTATE READINESS CHECKLIST

Purpose: Entry point into the conversation

How to use:

- Share in email, meetings, or workshops
- Use it to help identify gaps in organization and clarity
- Review responses with the client to guide the conversation

This tool helps shift the conversation from assumptions to specifics.

Assets Included And How To Use Them

2. CLIENT CONVERSATION GUIDE

Purpose: Support consistent advisor language

How to use:

- Reference before client meetings
- Use conversation starters to open discussions naturally
- Guide clients from opinions to planning considerations

This is not a script. It is a framework for better conversations.

Assets Included And How To Use Them

3. EMAIL CAMPAIGN

Purpose: Drive awareness and engagement

How to use:

- Send to clients and prospects
- Reinforce the concept of readiness versus completion
- Direct recipients to the checklist or a planning conversation

Select the emails that best fit your audience and cadence.

Assets Included And How To Use Them

4. MEDIA SCRIPTS (TV, RADIO, SOCIAL, DIGITAL)

Purpose: Generate inbound interest and reinforce messaging

How to use:

- Use 30 or 60-second scripts depending on placement
- Maintain the same positioning used in client conversations
- Select one call to action per use

Consistency across channels improves recognition and response.

Assets Included And How To Use Them

5. LEGACY LETTER

Purpose: Add a personal and values-based element to planning

How to use:

- Introduce after a planning conversation
- Position as a complement to documents, not a replacement
- Encourage clients to communicate intentions in their own words

This tool helps move the conversation beyond assets and into meaning.

Recommended Advisor Workflow

Use the campaign in a simple progression:

1. Introduce the topic through email, media, or a meeting
2. Offer the Estate Readiness Checklist
3. Review results and identify gaps
4. Discuss organization, clarity, and family impact
5. Introduce the Legacy Letter when appropriate
6. Coordinate with legal professionals as needed

This structure keeps the conversation clear and repeatable.

What Should You Do

- Keep conversations simple and practical
- Ask questions that reveal gaps in readiness
- Focus on clarity and organization
- Use the provided tools consistently
- Position yourself as a planning resource, not a legal provider

What You Should Avoid

- Providing legal advice
- Recommending specific legal documents
- Using fear-based language
- Treating this as a one-time conversation

Timing And Deployment

This campaign works well after tax season and before year-end planning begins. It is effective during periods when clients are more open to broader planning discussions.

Introduce it during:

- Client review meetings
- Prospect discovery meetings
- Workshops or educational events
- Follow-up conversations after tax discussions

Success Metrics For Advisors

Track results based on activity and engagement:

- Number of checklist completions
- Number of planning conversations generated
- Gaps identified in beneficiary designations or organization
- Client follow-up actions taken
- Referrals resulting from family-centered discussions

Compliance Considerations

This campaign must remain educational. Do not present yourself as providing legal advice.

Use language such as may, can, and could when discussing outcomes. Avoid definitive statements about results.

Refer clients to qualified legal professionals for document drafting or legal interpretation.

Final Guidance For Advisors

This campaign is most effective when it feels calm, practical, and helpful.

Your role is to guide clients toward better organization and clarity. When done well, this topic naturally leads into broader conversations about income planning, tax planning, and family coordination.

Focus on making the process simple for the client. Clarity drives action.

