

ESTATE & LEGACY PLANNING

MEDIA TALKING POINTS

PURPOSE OF THIS DOCUMENT

These talking points are built for advisors who want to bring a clearer, more practical perspective to estate planning conversations without relying on a script.

Many clients believe this area of planning has already been handled. Documents were signed, decisions were made, and the topic feels complete.

What is often missing is a conversation around how that plan would actually function in real life.

These talking points are designed to help you guide clients into that conversation in a way that feels natural, educational, and aligned with how you already work with them.

HOW TO USE THESE TALKING POINTS

- Select one topic per video or post
- Keep delivery simple and conversational
- Focus on education, not urgency
- Use one clear call to action at the end

1. COMPLETED DOES NOT ALWAYS MEAN READY

- Many people believe estate planning is finished once documents are signed
- A plan can be complete but still difficult to follow
- Readiness includes organization, clarity, and accessibility
- The real question is whether your family would know what to do

2. THE FIRST FEW DAYS MATTER MOST

- Most plans focus on long term distribution
- Few address what happens in the first few days
- Families often need direction before they need distribution
- Simple instructions can reduce confusion early on



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3. KNOWING WHERE TO START

- In many cases, families do not know who to call first
- Important information may be difficult to locate
- A clear starting point can change the entire experience
- Organization helps create direction during uncertainty

4. THE ROLE OF DECISION MAKERS

- Estate plans often name decision makers
- Those individuals may not feel prepared
- Preparation can be just as important as selection
- Confidence plays a role in how decisions are carried out

5. ORGANIZATION IMPACTS OUTCOMES

- Even well-designed plans can create challenges if information is scattered
- Organization improves efficiency and clarity
- A central system can reduce delays and frustration
- Simplicity often leads to better outcomes

6. BENEFICIARY DESIGNATIONS MATTER

- Beneficiary designations can influence how assets are distributed
- They may not always align with estate documents
- Periodic review can help maintain consistency
- Small details can have a meaningful impact



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7. COMMUNICATION CAN REDUCE CONFLICT

- Silence can create confusion for families
- Clear expectations can help avoid misunderstandings
- Communication does not require sharing every detail
- Guidance can make decision-making easier for others

8. LIFE CHANGES REQUIRE UPDATES

- Estate plans are often created at one point in time
- Life events can impact how those plans function
- Regular review helps keep plans relevant
- Planning should evolve over time

9. SIMPLICITY CREATES CLARITY

- Complex plans can be difficult to execute
- Clear instructions support better outcomes
- Simplicity can reduce stress for families
- The goal is usability, not just completion

10. ESTATE PLANNING IS ABOUT EXPERIENCE

- Estate planning is often viewed as a legal process
- It also shapes the experience your family may have
- Organization and clarity can influence that experience
- Planning is not only about assets, but it is also about people



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SUGGESTED CALL TO ACTION OPTIONS

Advisors should choose one call to action based on their available resources:

- Direct viewers/listeners to visit your free Legacy & Estate Planning Readiness quiz
- Invite viewers to complete the Estate Readiness Checklist
- Direct viewers to download the Estate Planning Guide
- Offer a planning conversation to review their current situation

FINAL GUIDANCE

Keep messaging calm, clear, and practical.

This content should help clients think differently about estate planning without creating pressure or urgency. When positioned correctly, these conversations lead naturally into deeper planning discussions.