ESTATE PLANNING SCRIPT

They downloaded:
• Estate Planning Guide
• Beneficiary Checkup Quiz
• Probate Avoidance Guide
• Trust Planning Guide

DELIVER

Hi [Name], this is [Advisor] with [Firm].
You recently completed our Estate and Beneficiary Checkup, and I just wanted to make sure the results came through okay. Did you receive them?

PIVOT

When you went through that estate and beneficiary checkup, what was really on your mind?
(Pause)

REFLECT OPTIONS

"I need to update things."
Got it. A lot of people have documents that technically exist but have not been reviewed in years.

"I want to avoid probate."
Right. Most people are not worried about dying. They are worried about putting their family through chaos afterward.

"I'm worried things do not line up."
That is actually one of the biggest problems we see. The documents exist, but the titles and beneficiaries do not match the plan.

"I want to protect family."
Exactly. Estate planning is really about protecting the people you care about from confusion, conflict, and unnecessary stress.

BRIDGE

That is where these conversations become valuable.
We help people simplify:
- beneficiary alignment
- titling issues
- trust coordination
- probate exposure
- incapacity planning
- and what actually happens in the first 90 days after someone passes.

BOOK

Let’s do a quick 15 minute Fit Call and see if there are any gaps or outdated areas that need attention. Would Wednesday at 9:50 or Thursday at 1:10 work better?

OBJECTION HANDLING — ESTATE PLANNING

“We already have documents.”

REFLECT Perfect. That already puts you ahead of most families.
REFRAME Where problems usually show up is not having documents. It is whether: beneficiaries, account titles, trusts and actual assets still match the documents.
BOOK We can sanity check that alignment pretty quickly. Would Wednesday at 9:50 or Thursday at 1:10 work better?