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SHOUP LEGAL

A PROFESSIONAL LAW CORPORATION

Best Thing We did for our Law Firm 2020

www.ShoupLegalWINS.com

By Implementing this:

1. Increase Conversion Ratio by 10%
2. Extra $100,000+ of Direct Fees this year
3. Hundreds of Thousands of Dollars in Sold Legal Services
4. Eliminate C – F Clients
5. EASY New Marketing Funnels
6. Higher Employee Satisfaction and Retention
7. Higher Client Satisfaction and Referrals
8. Single hour of TRAINING Time

Example: My LLC Formation Transformation for NEW Startup

- Previously: Our LLC was $1,850.00.
  People would literally laugh at my fees during my **free** consultation
- Furious at Andrea for suggesting an increase…
- Last week our LLC fee and other services:

$8,000.00

Increase of 430%

As we explained during LQM…
From This Strategy In ONLY 6 Months:

- $63,874.00 Direct Revenue
- $383,534.69 Additional Revenue
- OVER 75% Conversion Rate (Increase of 10%)
- ACV has increased in some cases as much as 450%
- HUNDREDS more on List
- BETTER Clients…that we actually want to help
- REMOVAL of Bad Clients BEFOFE meeting

DO I HAVE YOUR ATTENTION NOW?

As you Know from the LQM:

Meet and Greet
Free Case Evaluation
FREE Consultations
Consultations
Undeveloped Strategy Sessions

Profit Generating
Fully Enhanced
Multi-Tiered

Ultimate Strategy Sessions System

YOU WILL HAVE WHAT YOU NEED TO IMPLEMENT…**ON MONDAY**!

We're Going to Give You:

1. How to Build and Name the Sessions
2. Identify your specific Deliverables
3. What clients need to bring?
4. How to Build Multiple Tiered Strategy Sessions
5. How to Price
6. Glide Path Letters and a Template for your ENTIRE Glide Path
7. Example Engagement Agreements…that SELL
8. Scripts for Intake & Sales

Let’s Get Started!

1. What is your Avatar’s biggest **need**?
2. What specific outcome are they looking for?
   1. “I am worried about…”
   2. “I want to accomplish…”
   3. “I really need….”

Name It!

[DELIVERABLE] Strategy Session

[OUTCOME] Strategy Session

[PAIN POINT] Strategy Session

<u>Examples</u>:

Trust Review Strategy Session

Business Incorporation Strategy Session

How to Prepare for Divorce Strategy Session

Shoup Legal
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Have you reviewed your **#EstatePlan** in the past 3 years? It's important to know when to review your plan and why. Personal changes and changes in the law can make your trust completely ineffective!

4 Reasons to Dust off your trust and come and see a qualified **#EstatePlanningAttorney**:

- You have had a major change in personal circumstances (marriage or divorce for example)
- There have been major changes to the law
- Your property or assets have significantly changed (have you purchased or sold **#realestate** lately?)
- Your children have aged (they were minors when your Estate Plan was prepared and are now adults)

Keep your Trust up to date with our specialized Trust Review Strategy Session.

Our team will completely review your current plan with a summary of recommendations to make sure your family is properly protected.

Call or email us today to schedule a strategy session!
(951) 445-4114 / INFO@SHOUPLEGAL.COM **See Less**

Determine Deliverables

At LEAST 3 TANGIBLE DELIVERABLES

NO FLUFF!!

During your [NAME OF SESSION] you will leave with a:

1. Thorough Evaluation of Your Case to prepare for [DELIVERABLE]
2. Understanding of Your Options for [PAIN POINT]
3. Three Strategies to achieve your [GOAL]

What do they need to bring?
They MUST BRING at least 3 – 5 things
at least 5 DAYS prior to Strategy Session:

Prior to your [NAME OF STRATEGY SESSION] make sure you drop off to our office the following:

1.
2.
3.
4.
5.

- PHYSICALLY DELIVER IT!
- DO NOT HAVE THEM EMAIL IT
- CALENDAR DROP OFF
- ATTORNEY “RANDOM MEETING”

Expand into Multiple Tiers!

Example: Estate Plan Review Strategy Session

LEVEL 1 Ex: Plan Review	LEVEL 2 Ex: Funding Level	LEVEL 3 Ex: Legacy Planning
• Review of your Plan (PAIN 1) • Written Evaluation • 60 Minute Strategy Session with your Attorney	• **Plan Review Plus:** • Evaluation of Real Property (PAIN 2) • Financial Assets (PAIN 2) • Beneficiary Designations	• **Funding Level and Plan Review Plus:** • Additional Meeting with family (PAIN 3) • In-depth Analysis of Family Dynamics and Planning Needs (PAIN 3)
$900.00	$1,350.00	$1,850.00

How much to charge?

1. Easy Starting Point: Use hourly Rate. Easy for Dragon to Sell and explain.
2. Hour Meeting + Preparation Time Needed + Value of YOUR Experience
3. More Advanced: 100% Value Based

Your Engagement

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...e of mind tomorrow.

matter beyond the strategy session or assist you with any other legal issues.

Not knowing whether your Estate Plan will protect you, your family, and all of your property can be nerve wracking. But don't worry… we are going to help you with this! Before your strategy session your attorney is going to:

1. Review all of your Estate Planning Documents. Are they still up to date with current law? How well was it prepared? Will it actually accomplish what you are wanting?
2. Pull Title and review all of your real property to make sure it is properly titled in the name of your Living Trust.
3. Review all of your provided financial accounts (bank accounts, IRAs, 401(k)s, and investment accounts). We will determine whether they are handled properly.

Did you know even a simple bank account if not properly placed into your Living Trust can be stuck in court for over one year?

During your meeting with your attorney, we will inform you what weaknesses and issues

...GEMENT LETTER

...u have chosen us to assist you with such an ...ur primary goal is to make sure that you are ...perience with us.

...NAME] Strategy Session. Please note that a ...an represent you or your business in this ...ou with any other legal issues.

...rotect you, your family, and all of your ...ry… we are going to help you with this! ...ng to:

...view all of your Estate Planning ...ocuments. Are they still up to date with ...urrent law? How well was it prepared? Will ...actually accomplish what you are wanting? ...ull Title and review all of your real property ...make sure it is properly titled in the name ...f your Living Trust. ...eview ...ll of your provided financial ...cco... (bank accounts, IRAs, 401(k)s, and

...your ...ve... e year?

...will inform you what weaknesses and issues ...rious solutions to address our concerns.

After our meeting we will give you a written summary of our evaluation for your records so you can go through this after our meeting regardless of whether you retain our firm to implement our strategies.

Andrea K. Shoup, Attorney
Estate Planning, Trust & Probate Certified Specialist
David A. Shoup, Attorney
Business & Estate Planning
Jennifer E. Dean, Attorney
Estate Planning, Trust & Probate
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Murrieta, CA 92563
Desert Location
Office: 760-808-8115
Fax: 951-445-4108
78060 Calle Estado, Suite 15
La Quinta, CA 92253

www.ShoupLegalWINS.com

Full Glide Path!

1. Shoup Legal uses 8 – 10 touch points before meeting
2. First Glidepath letter should be received within 24 hours!
3. Counteract the “shopping around” or price regret syndrome

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Plan today for peace of mind tomorrow.

[date]

[name]
[address]
[address]
[email address]

Re: Preparing for your [name of Strategy Session]

Dear [Client Names]

Thank you for giving us the opportunity to help you with your Estate Planning needs, we look forward to meeting with you soon. As a reminder, you have selected the [name of Strategy Session], which means we will be providing you the following:

1. Complete review and analysis of your Estate Planning Documents (as outlined in your Engagement Agreement)
2. Complete review and analysis of your Bank Account Statements, Financial Statements, Beneficiary Designations, Retirement and Pension Statements, Real Property Title, and Investment Summaries
3. Review Current Funding of your Estate Plan (including your businesses)
4. Preparation of a written summary of your Attorney’s observations, recommendations, evaluation, and specific proposed strategies to address any concerns
5. A Forty-Five Minute Strategy Session with your Attorney to review the above.

This is a very involved process, and we are excited to assist you with this. Please make sure you drop off the following to our office located at 39755 Date Street, Suite 203, Murrieta no later than [date] for your strategy session with your attorney on [date]:

1. Your Estate Planning Binder (including all of the Estate Planning Documents outlined in your Engagement Agreement)
2. Bank Account Statements, Financial Statements, Beneficiary Designations, Retirement and Pension Statements, and Investment Account Summaries
3. Business Formation Documents (Minutes Book/folder)
4. All Real Property Deeds (we will pull title for you if you cannot find these)

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Glide Path to SELL

PNC Call	**Within 24 hours** Glidepath Letter #1 Confirmation Email Eng Agmt	**3 days** Video of Content from Attorney	**4 days** Reminder phone call about Documents Check in	**5 days** Delivery of Documents	**6 days** Email Glidepath Letter #2	**7 days** Reminder Call	**8 days** Appointment	**1 day after** Written Summary

Client needs to PHYSICALLY DELIVER to your office

Schedule it!

THEN "Random" Attorney Encounter

How to Sell: “Phone Answering Person” Scripts

1. We don’t waste your Time
2. Your Attorney is prepared to assist you IMMEDIATELY
3. Leave with Specific Strategies
   - Written evaluation
4. Better Legal Solutions
5. Money Back Guarantee

LLC Formation Transformation for NEW Startup

- Remember that **$8,000.00** LLC?

Increase of 430%

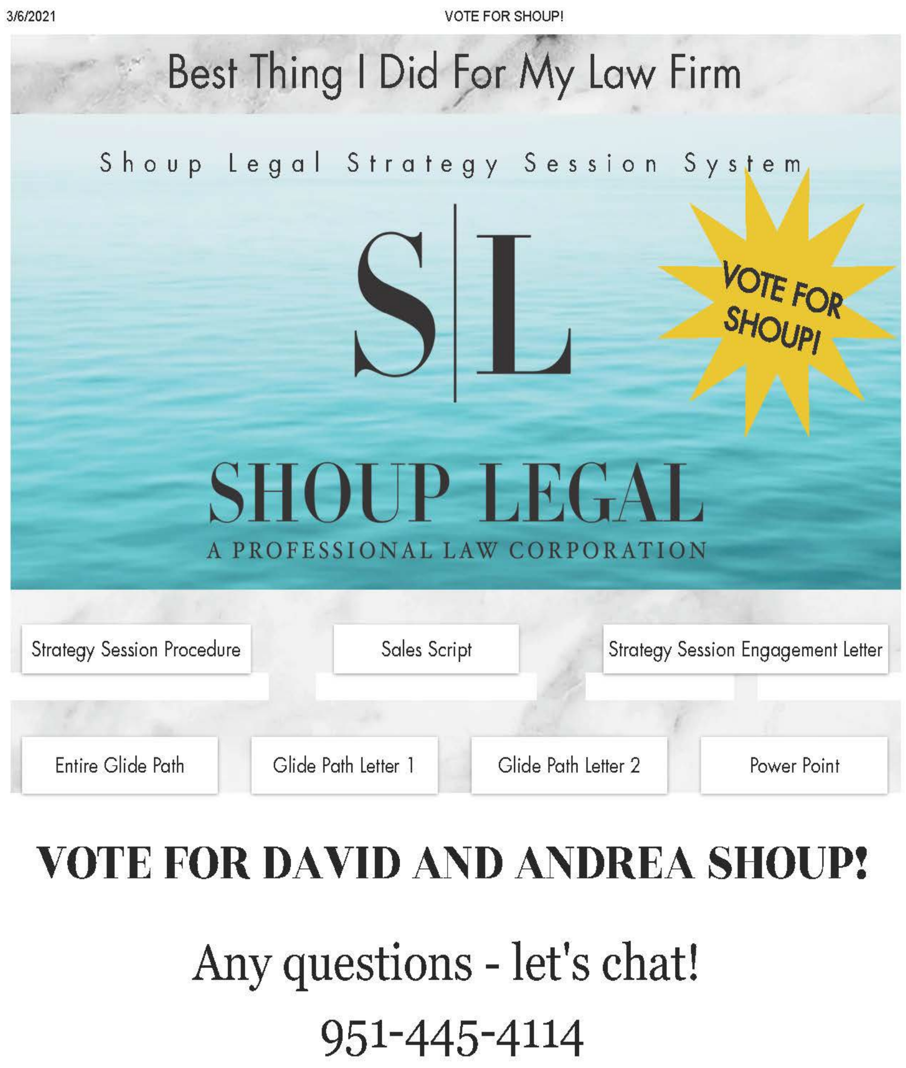
Your Employees will LOVE this!

Your Clients will LOVE this!

WE HAVE EVERYTHING FOR YOU

- Go to: https://www.shouplegalwins.com/
- Here You will find:

1. Strategy Session Engagement Agreement
2. TWO Strategy Session Glidepath letters
3. Complete Example Glidepath
4. Strategy Session SCRIPT for Intake and/or Dragon
5. Strategy Session Procedure for office Staff



There you go!

Your Strategy Session SYSTEM For **Monday**

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Ultimate Strategy Session System

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