

## **Ia. Attorney Breakout: Formula Clauses w/ Craig R. Hersch** **Ib. Team Breakout: Expectation Awareness w/ Maria L. Reimer**

Craig will lead BluePrint attorneys in our opening module of the morning with our technical session on revocable trust formula clauses. When should you use a fractional clause? Pecuniary clause? Did you know there are capital gains tax consequences? Here we review the legal and tax consequences of different formula clauses.

Maria will concurrently lead the Team breakout: Have you articulated your expectations? What happens when a team member isn't aware of his or her success criteria? What if a team member is performing below expectations? This module is a team discussion of the whys, whats and hows of communicating expectation awareness.

## **II. Find Your Why - Craig R. Hersch**

What is your why? What is your firm's why? You might accurately describe WHAT you do. Fewer can articulate HOW they do it. The WHY is the crucial "feel good" reason your clients adore you. Here we'll take the first steps to discovering your why that you may use on your website and in your literature.

## **III. Closing the Client Care Sale - Maria L. Reimer**

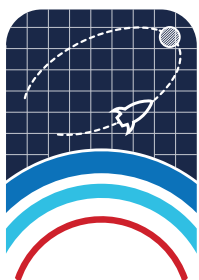
For those who have adopted a Client Care program, Maria L. Reimer provides insights on how to make enrollment seamless with your client experience. It's important to introduce the program from the very first interaction your client has with your firm all the way to enrollment.

## **IV. Relationship Building - Craig R. Hersch**

An estate planning practice is all about relationships. Which are the ones that support you and your practice? Why are these the most important? How about building relationships over social media? What might you do to accomplish that? Why is it important? Here we discuss practical ideas to build upon, foster, and create better relationships.

## **V. Tech Spotlight: Optimizing The ReMarkable Tablet with Karen Brady and Brontie Masero of Brady, McFarland & Lord, LLC**

For our guest spotlight, Karen Brady and Brontie Masero from Brady, McFarland & Lord talks about the Remarkable device: a handheld digital writing device with special capabilities.



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