THE FREEDOM PRACTICE®

Craig R. Hersch

ATTORNEY - CPA - AUTHOR - COACH SPEAKER - ENTREPRENEUR

Entrepreneurial Strategies for the 21st Century Trusts & Estates Professional & Firms

AS SEEN ON

CBS · USA TODAY · TRUSTS & ESTATES · FOX · WealthCounsel Practice Excellence.

Craig R. Hersch is a National Practice Development Expert who created innovative trademarked processes tied to his estate planning and administration practice, including The Family Estate & Legacy Program® and The Estate Settlement Program®, The Advanced Planning Expander™ and The Transitional Event Sequence™. All of these unique processes are designed to provide his clients comfort and clarity when navigating the complex legal, tax and financial concerns associated with planning and administering an estate.

Through the creation of The Freedom Practice®, Hersch coaches law firms and trust companies. He licenses his cutting-edge systems to help attorneys and trust companies around the nation better serve their clients and make their practice rise above others in the quickly changing and highly competitive marketplace.

His practice development expertise is showcased in Trust & Estates Magazine, a national trade journal for attorneys, CPAs and financial advisors. Craig serves on Trusts & Estates Magazine's Editorial Advisory Board, and was awarded their Distinguished Authors Award. He also writes a national column on their website, **wealthmanagement.com.**

Hersch provides his expertise as a featured lecturer at continuing education programs sponsored by WealthCounsel, the Florida Bar, the Florida Institute of Certified Public Accountants and The National Business Institute.

Hersch is a Florida Bar Board Certified Wills, Trusts & Estates attorney, CPA, and has an entrepreneurial background as a founding shareholder and director of a private state-chartered trust company in Fort Myers, Florida.

He is the author of seven books, Common Cents Estate Planning (2014), Legal Matters When a Loved One Dies (2015), The Florida Residency & Estate Planning Guide (2016), Selecting Your Trustee (2017) The Estate Planner's Guide to Practice Development (2017), Asset Alignment and Your Estate Plan (2018) and Commen Cents Estate Planning II (2020). His work appears in several professional journals, including The Practical Tax Lawyer, Trusts & Estates Magazine and The Florida Bar Journal.

Moreover, he hosts multiple podcast series geared towards estate planning professionals, clients and trust administrators, and he authors a weekly estate planning column published in Sanibel's Island Sun newspaper. That and other media appears at **floridaestateplanning.com/learning-hub.**

Since 2005, Hersch participates in **The Strategic Coach®**, an international entrepreneurial coaching program based in Toronto and Chicago, creating business and marketing strategies he successfully implements into his law practice. His uniquely varied background in law, accounting, tax and finance enables him to deliver high-energy, dynamic speeches that provide lawyers, CPAs and financial firms with valuable information to apply in their own practices.

THE FREEDOM PRACTICE®

BOOKS:

- Common Cents Estate Planning, 2014
- Legal Matters When a Loved One Dies, 2015
- The Florida Residency & Estate Planning Guide, 2016
- Selecting Your Trustee, 2017
- The Estate Planner's Guide to Practice Development, 2017
- Asset Alignment and Your Estate Plan, 2018
- Common Cents Estate Planning II, 2020

CRAIG'S FOCUS:

- Concentrating on your unique ability to achieve greater freedoms of time, money, relationship and purpose
- Building your best ever support team
- Providing your clients exceptional value through leadership, education, relationship and creativity
- Learning how identifying mindsets leads to consistently attracting A+ clients
- Creating front stage and back stage processes that out-deliver your competitors

PODCASTS:

- The Freedom Practice® - Front/Back Stage Estate Planning and Administration Systems
- The Family Estate & Legacy Program®
- The Estate Settlement Program®
- The Estate Planner's Practice Development Podcast™ with Patrick Carlson

NATIONAL WEBINARS:

- Trusts & Estates:
  - Marketing the Modern Estate Planning Practice
  - How to Do a Podcast to Enhance Your Practice
  - Hiring an Advertising and Public Relations Firm
- WealthCounsel:
  - The Commoditization Trap
  - The Experience Economy
  - Systemizing Yet Customizing Your Practice
  - If You Can Get the Milk for Free, Why Buy the Cow?
  - Becoming the Local Go-To Expert
  - Modern Media & Marketing
  - Mindset Series: The Attorney Mindset
  - Mindset Series: The Team Mindset
  - Mindset Series: The Client Mindset
  - Mindset Series: The Trustee Mindset
  - Overcoming Client Objections

To meet with Craig, contact Maria Reimer at 239-425-9360 or mreimer@4freedompractice.com.

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