THE FREEDOM PRACTICE

WORKING LONGER FOR THE SAME REVENUE?

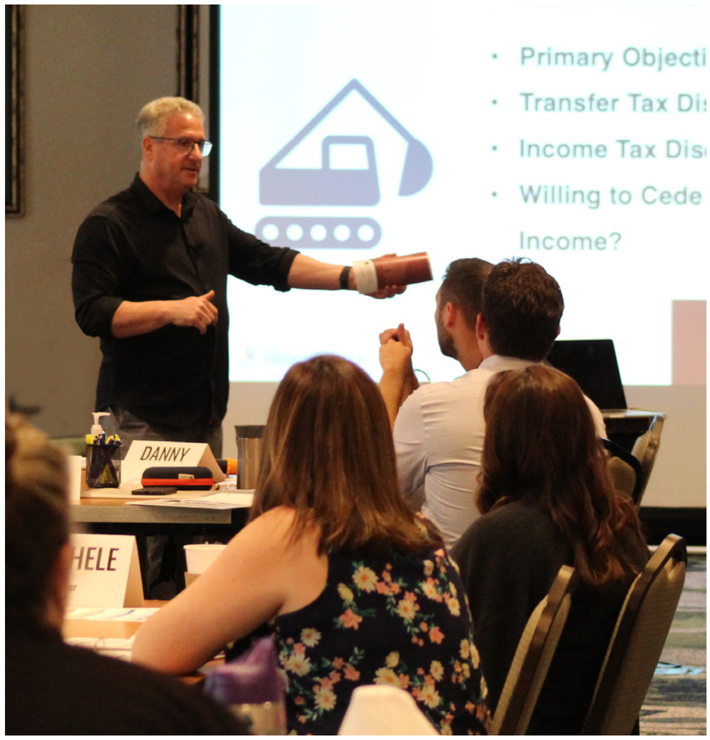
DOES YOUR STAFF SUPPORT YOU OR DO **YOU** SUPPORT **THEM**?

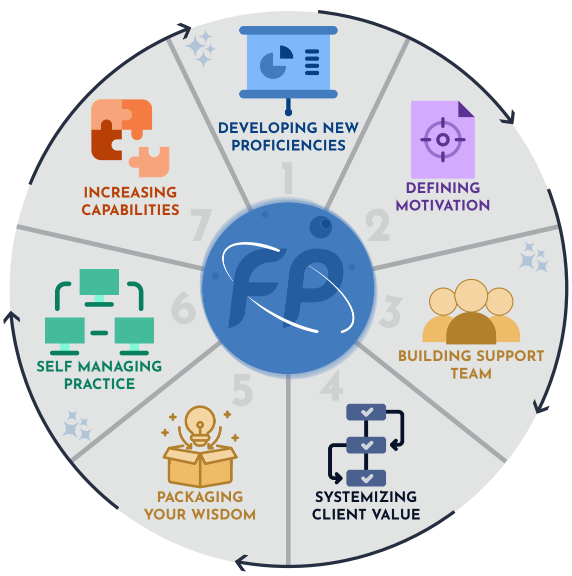
QUESTIONS ON AUTOMATING ROUTINE TASKS?

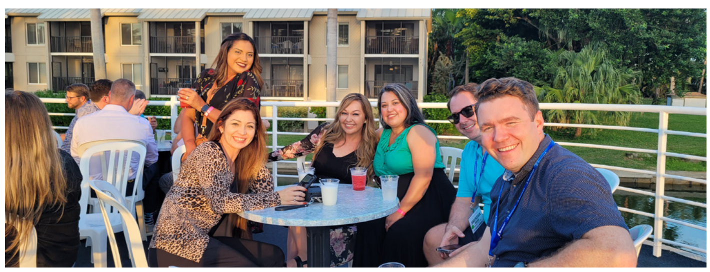
WONDERING HOW TO UPGRADE TO **A+ CLIENTS**?

CONSIDERING A CLIENT CARE PROGRAM?

THE **PRACTICE XCELERATOR**™ EVENT







EXCLUSIVELY FOR ESTATE PLANNING LAW FIRMS

A 2-DAY INTERACTIVE EXPERIENCE YOU CAN'T MISS!

GAIN FREEDOMS FROM AN OPPRESSIVE PRACTICE MODEL

EMBASSY SUITES

ESTERO, FL MAY 19-20, 2022

COURSE OVERVIEW

Since joining Freedom Practice® we have multiplied revenues, acquired new capabilities and gained freedoms which makes our practice more enjoyable for us, our team, and our clients.


Shayna Borakove
Peter Osman
Borakove Osman, LLC
Madison, Wisconsin

SYSTEMS AND PROCESSES

Learn how to optimize your back-stage systems and processes to consistently provide a uniquely valuable front-stage experience your clients will gladly pay a premium for. As a successful estate planning practice, you may have some of this in place. Any missing elements will readily become apparent to you.

TEAM BUILDING

Our Kolbe certified specialist will describe how to hire, train and review "right fit" team members. We'll provide you instruction for our trademarked Freedom Practice® Team Tools Kit, that will transform you and your team, taking you to that next level.

TECHNOLOGY

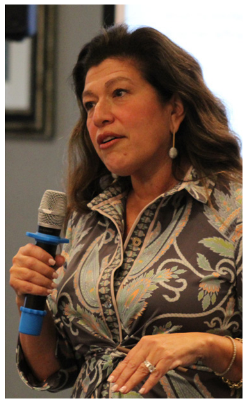
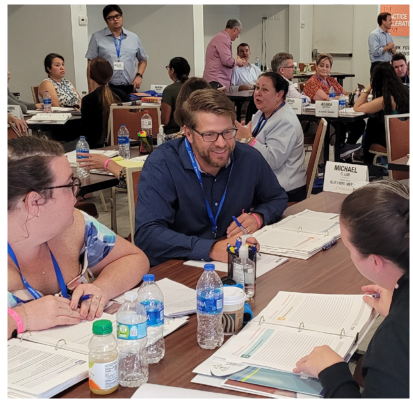
Go beyond the technology you use and that everyone else does, too. We'll show you how to integrate free and low-cost programs to organize your firm's intake and work-in-process so no file or project will fall through cracks. We'll also demonstrate how to automate many tasks that currently take too much time.

MARKETING

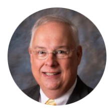
The goal with marketing is to package your wisdom, whether it's directly to your clients, prospects or centers of influence, or electronically on the Internet. We cut through the clutter to help you create influential, persuasive, classy marketing programs.

CLIENT CARE

Which Client Care model should you emulate? Do you even know there are several, some more appropriate for your firm than others? We dive into the elements your particular client population will find extremely valuable, resulting in 5 star satisfaction ratings, more referrals, and annuitizing your client base.

The lessons I'm learning and implementing are invaluable to me and my team, and I'm saying this having run a successful practice for over 40 years.



Ted Gudorf
Gudorf Law Group, LLC
Dayton, Ohio

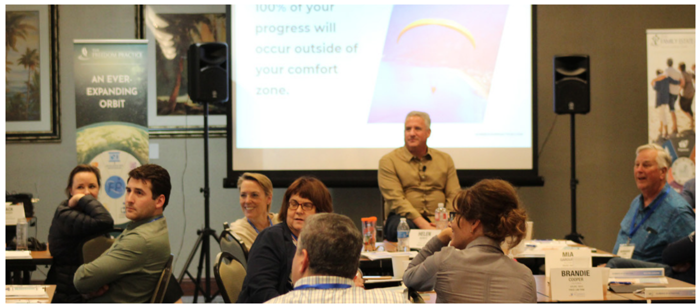
We have been able to quickly implement programs and systems that completely reworked how we run our firm, shifted our entire approach to how we market and grow our business.


Ken Simmons
& Marco Schiavo
Simmons & Schiavo LLP
Woburn, Massachusetts

EVENT INFORMATION

ENROLL TODAY!

There are a limited number of seats available for this event that sells out every year!



THURSDAY, MAY 19TH

Breakfast Served	7:30am	8:30am
Sessions	8:30am	12:00pm
Lunch Served	12:00pm	1:00pm
Sessions	1:00pm	5:00pm

FRIDAY, MAY 20TH

Breakfast Served	7:30am	8:30am
Sessions	8:30am	12:00pm
Lunch Served	12:00pm	1:00pm
Sessions	1:00pm	5:00pm

Please Do Not Schedule a Return Flight until after 7PM

***Best Idea is to fly out the next day and download with your team.**

TO ENROLL VISIT 4FREEDOMPRACTICE.COM/PX2022 OR SCAN THE CODE BELOW

TUITION

TWO FOR ONE PRICE!

BEFORE APRIL 1ST - $3,000 AFTER - $3,500

This enrollment allows you to bring one other member from your law firm. It's important to bring along someone who can prioritize and implement key takeaways.

www.4freedompractice.com/PX2022

ACCOMMODATIONS & LOCATION

EMBASSY SUITES

10450 Corkscrew Commons Dr
Estero, FL 33928
(239) 949.4222
Scan the QR Code below for Reservations

AIRPORT INFORMATION

RSW - Southwest Florida International Airport

Embassy Suites has a shuttle service to and from the airport

EVENT SPONSORS

The Sanibel Captiva Trust Company | The Naples Trust Company | The Tampa Bay Trust Company

Divisions of The Sanibel Captiva Trust Company

TRUSTS & ESTATES

KOLBE CORP

STRATEGIC COACH®

COURSE DETAILS

THURSDAY, MAY 19th

THE CLIENT EXPERIENCE

Craig Hersch first published on this subject in *Trusts & Estates Magazine*. In a commoditized world, your clients expect a transaction when you intend to create a valuable experience. Consequently, the client fee expectation is often much lower than your intended charge for your services. What steps must you take to bridge the experience gap before and during the time of engagement?

FRONT/BACK STAGE SYSTEMS AND CLIENT VALUE CREATION

What will clients pay a premium for? In this session we discuss how consistent systems and processes are crucial to creating client value, comparing transactional versus experience economy models. We also define the three elements of client value, and how that applies to your estate planning practice.

OVERCOMING RUGGED INDIVIDUALISM

Leading an estate planning law practice from its inception requires being comfortable with risk and a "do-it-yourself" spirit, or "rugged individualism." That mindset allows you to thrive…in the early years of your practice. Eventually you reach a ceiling, requiring you to find multipliers, and more importantly, letting go to enlist them. Three statements identify you as a rugged individualist. What are they? Techniques to break-through to the next level addressed.

SUCCESSFUL INITIAL CLIENT INTERVIEW

An initial interview is much more than signing an engagement letter, nor is it all about socially connecting with the client, although these two items are important. It's vital that two goals are accomplished – you want your client to see the unique value that your firm will create for him or her, with the implied understanding that they can't find the same services anywhere else for any price. We'll demonstrate how to differentiate your practice from the competition.

FOCUSED, NOT FRUSTRATED

A very real danger with taking your practice to higher levels is the feeling that you'll never get to the top of that mountain. Guess what? You won't! Because once you summit, you'll have your sights set on another, higher mountain. Constantly looking for that higher summit can be emotionally draining and sap your energy, and that of your team. As Colorado hikers know, "every now and then, turn around, because that's where the view is."

KEY TAKEAWAYS AND ACTION PLAN

We provide thinking tools to record your key takeaways as they occur during our sessions to create an action plan when you return to your office. Before we break for the day to enjoy dinner together, we ask you to share one key takeaway with everyone that you plan to implement into your practice.

DINNER AT A LOCAL FAVORITE

After Thursday's sessions we kick back and relax at one of Fort Myers local favorites, for a night of waterfront dining, featuring fresh seafood and a full bar with live entertainment!

Provided By: The Sanibel Captiva Trust Company | The Naples Trust Company | The Tampa Bay Trust Company

Divisions of The Sanibel Captiva Trust Company

COURSE DETAILS

FRIDAY, MAY 20th

RIGHT FIT TEAM MEMBERS

You never know who you hired until they start working for you, right? This bromide isn't true with today's online tools available to your practice. Maria Reimer, a Kolbe* certified specialist, will walk you through how personal assessment tests can be used to fit team members, even existing ones, into positions where they will thrive. We'll also review the Freedom Practice® Team Tools Kit, which sets up each team member for success from the onset of employment through annual reviews.

MARKETING AVATAR & NICHE

To develop classy marketing geared toward your A+ client, you must first describe, in great detail, the physical, emotional, socio-economic and demographic attributes of that client. Your outreach efforts towards "anyone who needs estate planning" will not succeed, as they won't speak to the needs and emotions of your specific niche. This deep dive provides you clear direction to put together influential, persuasive, educational materials your prospects will look for.

OVERCOMING OBJECTIONS TO TRUST ADMINISTRATION SERVICES

Wasn't probate avoidance the selling point of a trust? After your client's death, how do you engage the client's spouse or children as trustee/executor/personal representative who believe that because client had a trust, there is nothing to do other than distribute assets? In this session we will review how a consistently applied, well considered Front/Back Stage system can take your probate and trust administration practice to the next level.

CLIENT CARE PROGRAM

Whether you call it annual maintenance or client care, the benefits to these programs are enormous. We review the different types of programs that you might incorporate into your practice, along with the advantages and disadvantages to each. Aside from annuitizing your client base, a great program forms a unique community differentiating your firm in the marketplace. We learned in yesterday's session that systemic client value creation drives your success – how will that shape your program from its inception and going forward?

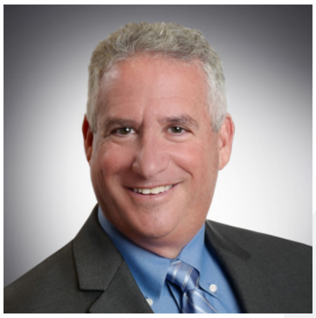
NO/LOW-COST TECHNOLOGY, NO FILE SLIPS THROUGH THE CRACKS

It is frustrating when a client calls because his file hasn't been touched for months. Despite dealing with a client fire, this could pose ethical problems if a bar complaint for neglect is filed. As your practice multiplies, keeping track of work-in-process becomes exponentially more difficult. Fortunately, there's free and low-cost software solutions you can integrate into your systems. We examine different technologies and discuss the importance of API in your CRM.

WRAPPING IT ALL UP - THE FREEDOM PRACTICE PROCESS

There's a seven-step process to incorporating new concepts and strategies into your practice. In your ever-expanding orbit your firm's capabilities increase while your personal focus becomes more precise and narrows. Going forward you'll have a templet to implementing all of the ideas that you gained from Practice Xcelerator.

THE TEAM
FREEDOM PRACTICE



CRAIG R. HERSCH

The Freedom Practice® is developed by Craig R. Hersch and his team at their own successful boutique estate planning practice in Southwest Florida. He's the senior partner at the Sheppard Law Firm, is a Florida Bar Board Certified Wills, Trusts & Estates attorney, and holds his license as a CPA. Craig is a prolific writer, authoring seven books and several white papers and articles found in professional journals. He serves on *Trusts & Estates Magazine*'s editorial advisory board in the Modern Practice Section, where he's known as a practice development expert.

MICHAEL B. HILL

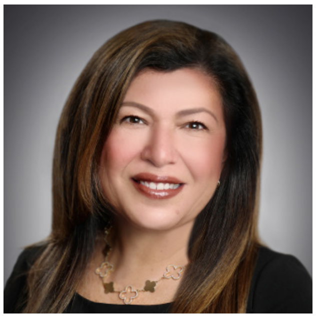
Michael B. Hill has been a law partner of Craig's for almost two decades. Mike is also a Florida Bar Board Certified Wills, Trusts & Estates attorney. He understands and incorporates technology into the firm's front and back stages. He's on the front line with our internal media team, and with the firm's outside CRM, online search and social media marketing vendors. Mike understands what works and what doesn't, sharing his valuable experience with Freedom Practice® firms.

HAYLEY E. DONALDSON

Hayley E. Donaldson, a partner in the firm, is an estate planning attorney and holds her CPA license. She heads our law firm's probate and trust administration practice. From her first day on the job, using The Freedom Practice's® Estate Settlement Program unique process, she engaged new clients for five and six figure fees. Hayley brings this expertise to law firms enrolled in the Freedom Practice® programs.

MARIA L. REIMER

Maria L. Reimer is the firm's Kolbe certified specialist. She incorporates strategic hiring methods and processes, team building and organizational systems, and team review structures into the firm's back stage. Her extensive knowledge of what motivates team members is invaluable to our Freedom Practice® members.



THE TEAM

FREEDOM PRACTICE

GINA SADOSKI

Regina L. Sadoski is the Logistics and Operations Specialist for The Freedom Practice®, and she serves that same role for the Sheppard Law Firm. She develops back stage systems and processes to ensure that files continue to move towards completion, and that client communications don't fall through the cracks. Further, she has perfected the initial stage of The Family Estate & Legacy Program® intake process. Regina takes these skills to Freedom Practice® member law firms, demonstrating how their team can function with more productivity, autonomy and transparency.

AIMEE BALCER

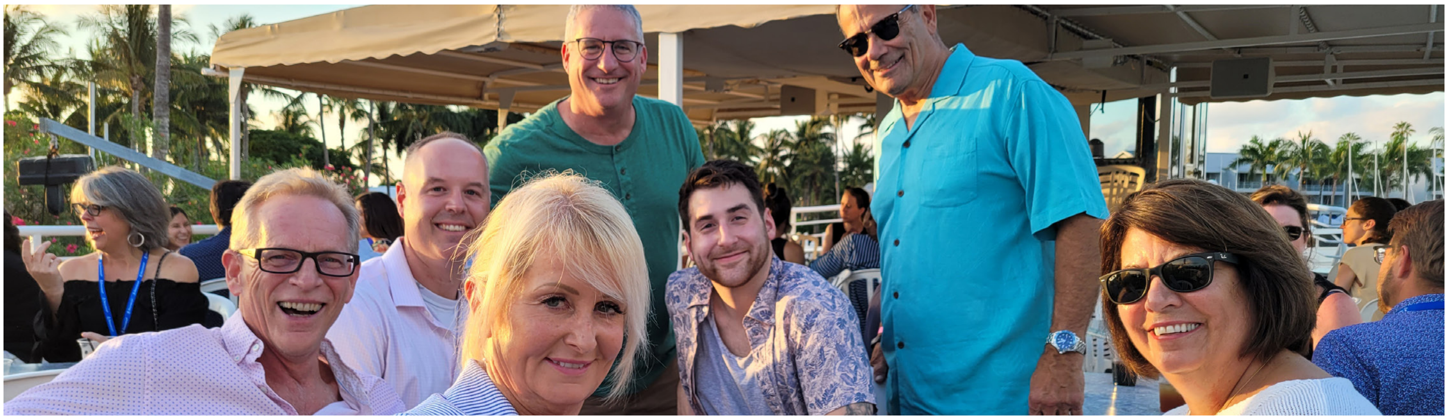
Aimee Balcer is the Lead Resource Specialist and Outsourcing Coordinator for the Freedom Practice®. She is also the lead paralegal for the Estate Settlement Program® for the Sheppard Law Firm. Aimee's extensive knowledge and documentation of the front and back stages of the firm's probate and trust administration, asset alignment, funding and Client Care Programs brings a unique set of skills she shares with Freedom Practice® member firms.

HAYDEN HEIDBREDER

Hayden Heidbreder is the Senior Marketing Technologist for The Freedom Practice® and the Sheppard Law Firm. He understands online-based marketing and social media platforms, CRMs, and constantly works to automate routine functions. Hayden works closely with the firm's outside technology and marketing vendors to ensure that the firm continues to attract A+ clients. He often strategizes with Michael B. Hill, ever improving our systems and processes.

ZACHARY RODGER

Zachary Rodger is the newest member of The Freedom Practice® and Sheppard Law Firm teams. He specializes in graphic design and web development. This entire brochure, the landing page and other media associated with The Practice Xcelerator event is Zachary's work. He assists Craig R. Hersch by graphically representing the front stage of the firm's offerings, making them real and desirable to our clients.



THE MOST FUN, VALUABLE & UNIQUE PRACTICE EVENT EXCLUSIVELY FOR ESTATE PLANNING LAW FIRMS

TO ENROLL VISIT 4FREEDOMPRACTICE.COM/PX2022

WHY IS THIS EVENT DIFFERENT AND MORE VALUABLE TO FIRMS LIKE YOURS THAN ANY OTHER?

- Practical Solutions to Everyday Problems
- CLE Credit available in many states
- Knowledge your typical CLE courses won't cover
- Fascinating Systems, Team, Technology and Marketing Strategies
- No Droning Lectures – True Interactive Classroom Experience
- Free Exchange of Ideas with other Law Firm Leaders Like You
- Groundbreaking Mindsets That Will Change Your Practice

It's important to get away from your office to clear your mind and consider strategies to take your practice to the next level. What better way to do that than a uniquely fun, valuable, two-day interactive experience with like-minded colleagues.

"The Practice Xcelerator Event is an excellent program with the right combination of theoretical and practical advice and discussion. In a 2 day program I was able to list more takeaways and action plans than any other event I have attended.

James Hopkinson
Hopkinson & Abbondanza
Portland, ME

"Practice Xcelerator provided me with the tools that enable me to gain confidence in my growth as a leader, entrepreneur, attorney, and as a person. I'm learning I have plenty of untapped value, that PX has helped me materialize, so I can be the best I can be. Thank you to the Freedom Practice team for all your collective wisdom, sharing, and experience!

Mark Ignacio
Mark Ignacio Law, APC
La Mesa, CA

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**Each state has different rules regarding CLE credit and we cannot guarantee a set number of approved accredited hours.