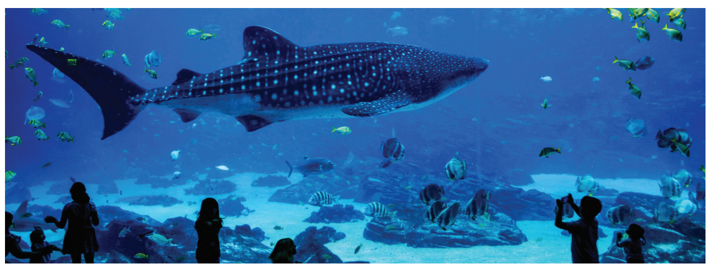
THE FREEDOM PRACTICE®

WORKING **LONGER** FOR THE **SAME REVENUE?**
DOES YOUR STAFF **SUPPORT YOU** OR DO YOU **SUPPORT THEM?**
HOW DO YOU STAY **TOP OF MIND** TO YOUR **CLIENTS & NETWORK?**
QUESTIONS ON **AUTOMATING ROUTINE TASKS?**
WONDERING HOW TO **UPGRADE TO A+ CLIENTS?**
CONSIDERING A **CLIENT CARE PROGRAM?**

PRACTICE XCELERATOR™

LIVE SPECIAL EVENTS



EXCLUSIVELY FOR BOUTIQUE ESTATE PLANNING FIRMS

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

BUCKHEAD ATLANTA

ATLANTA, GA SEPTEMBER 14-15, 2022

GAIN FREEDOMS FROM AN OPPRESSIVE PRACTICE MODEL

COURSE OVERVIEW

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 boutique 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

It’s a brave new world with online search and social media marketing. We’ve learned from experience (read costly mistakes) what works, and what doesn’t. How do you package premium services for premium fees? After this event, you’ll understand exactly what you’re looking for before engaging a marketing, social media or Google specialist.

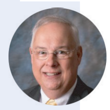
CLIENT CARE

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.

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


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!

WEDNESDAY, SEPTEMBER 14TH

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

After Wednesday's session, group dinner at local restaurant provided by The Freedom Practice®.

THURSDAY, SEPTEMBER 15TH

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

TO ENROLL VISIT

4FREEDOMPRACTICE.COM/PX2022

OR SCAN THE CODE BELOW

TUITION

TWO FOR ONE PRICE!

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

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®

FIRM REQUIREMENTS

The Freedom Practice® is not for every firm. **We cater to ambitious estate planning leaders.** Those with open minds about their practices, and are willing to commit to taking strategic risks to take their practice to the next level will benefit more than those who don't.

COURSE DETAILS

WEDNESDAY, SEPTEMBER 14TH

THE BIG PICTURE - MACRO-ECONOMIC EFFECT ON ESTATE PLANNING PRACTICES

The power of the Internet and the microchip has affected nearly all businesses. This session examines clients' perception of estate planning services in a transactional economy where many goods and services are commoditized. This concept is one of the basic foundations of The Freedom Practice® leading to mindset shifts necessary to take your practice to the next level.

FRONT/BACK STAGE SYSTEMS AND CLIENT VALUE CREATION

In an age of commoditized transactions, 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 value, and how that applies to your estate planning practice.

OVERCOMING RUGGED INDIVIDUALISM

Leading a boutique 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.

SIX PRINCIPLES OF PERSUASION

Clients often do not realize the legal, tax and financial issues they face, nonetheless, how to solve them. There's an art to identifying your client's problems so they understand why a solution is necessary. Building on the commoditization trap and experience economy theories, we examine Robert Cialdini's six principles of influence. We consider the difference between "sales" and "marketing" together with the ethical issues raised, and how to incorporate these principles into your Front Stage and Back Stage systems.

"YOU WANT HOW MUCH FOR THAT TRUST?!" ELEMENTS LEADING TO A SUCCESSFUL ENGAGEMENT

Modern economics prove prices fall as services become commoditized. Now that we have a basic understanding of client's value perceptions, how do we distinguish our services setting the stage for premium fees? What exactly is it that are you selling? Documents? Strategies? How much should you charge for your services? How should you discuss fees? The Freedom Practice® Family Estate & Legacy Program® client intake and engagement systems reviewed here.

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.

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 and head to the ferry dock to enjoy our cruise and island dinner, we ask you to share one key takeaway with everyone that you plan to implement into your practice.

COURSE DETAILS

THURSDAY, SEPTEMBER 15TH

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 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.

BRAVE NEW WORLD MARKETING

Google ad-words, Google reviews, Facebook ads, Twitter, Instagram, LinkedIn, YouTube, TikTok…the choices are endless and overwhelming. Where to begin in this brave new world of technological marketing? The first step is clearly identifying your target market. In this session we will provide valuable thinking tools to establish those avatars. What follows is a discussion addressing how to evaluate Internet and social media companies seeking your marketing dollars. We will share our victories, as well as our costly mistakes, so you avoid the same problems we once encountered.

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?

THE EXPERIENCE GAP

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?

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." As we wind down our two-day event, we'll focus on celebrating achievements thereby fueling further motivation.

DAY TWO - STRATEGIES TO IMPLEMENT

Like our end of Day One takeaways, here you'll work with your colleagues to flesh out the first strategy you want to implement. Remember the lesson that you learned about rugged individualism. You don't need to know the "how" so much as "who" will accomplish the tasks necessary to achieve those goals.

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

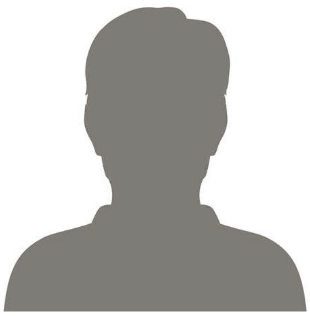
FREEDOM PRACTICE

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.



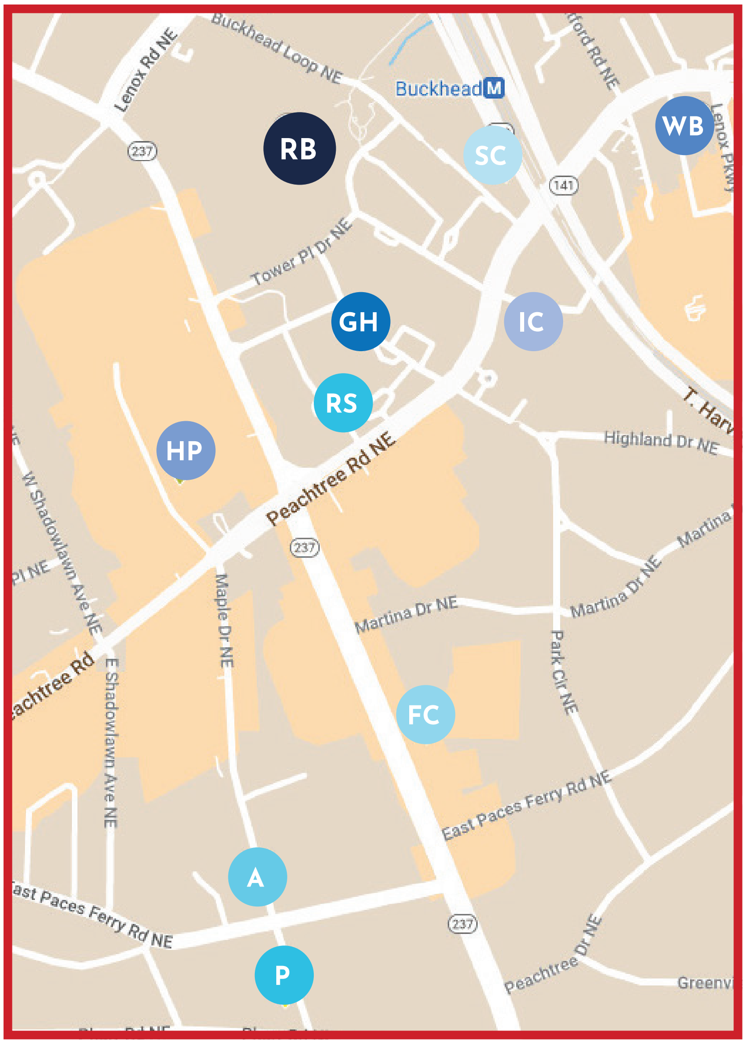
LIAM LADIA

Liam Ladia is the head of Marketing and Development 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. Liam 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.

MARIA NASTASI

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

ATLANTA MAP



ATL
Hartsfield-Jackson Atlanta International Airport

Take MARTA to Buckhead Station

WORKSHOP LOCATION

RB

ROAM BUCKHEAD
3365 Piedmont Rd. NE
Atlanta, GA 30305
Ph: 404.465.3485

RECOMMENDED HOTELS

GH

GRAND HYATT
3300 Peachtree Road NE
Atlanta, GA 30305
Ph: 404.237.1234
Click Here to Book

HP

HYATT PLACE
3242 Peachtree Rd NE
Atlanta, GA 30305
Ph: 404.869.6161
Click Here to Book

WB

WESTIN BUCKHEAD
3391 Peachtree Rd NE
Atlanta, GA 30326
Ph: 404.365.0065
Click Here to Book

IC

INTERCONTINENTAL
3315 Peachtree Rd NE
Atlanta, GA 30326
Ph: 404.946.9000
Click Here to Book

THINGS TO-DO IN THE AREA & PLACES TO EAT:

P

PRICCI
500 Pharr Rd NE
Atlanta, GA 30305
Ph: 404.237.2941

A

ARIA
490 East Paces Ferry Rd NE
Atlanta, GA 30305
Ph: 404.233.7673

FC

FOGO DE CHAO
3101 Piedmont Rd NE
Atlanta, GA 30305
Ph: 404.266.9988

SC

SOUTH CITY KITCHEN
3350 Peachtree Rd NE Suite 175
Atlanta, GA 30326

PB

PEMBERTON PLACE
126 Ivan Allen Jr Blvd NW
Atlanta, GA 30308

PP

PHILLIPS PLAZA MALL
3500 Peachtree Rd NE
Atlanta, GA 30326