Estate Planning Conversation Starter

Getting started with Estate Planning doesn't have to be intimidating. Gain confidence to talk with clients about Estate Planning issues by using two free fpPathfinder Estate Planning checklists. When you're ready, dig deeper with EncorEstate's Knowledge Base articles, which complement these fpPathfinder checklists. When you use them together, you're fully equipped to handle the common Estate Planning issues that arise in client conversations.

Creating an Estate Plan

Free fpPathfinder Checklist:

- What Issues Should I Consider When I Create My Estate Plan?

For clients without an estate plan, these articles help you go deeper into explaining Estate Planning issues they might have never thought about.

- Introduction To Estate Planning (For Clients)
- Picking An Ideal Health Care Agent – Client-Facing
- Client-Facing Estate Planning Introduction and Worksheet
- Trust-Based Estate Plans vs Will-Based Estate Plans: Deciding Factors Your Clients Should Consider

Updating an Estate Plan

Free fpPathfinder Checklist:

- What Issues Should I Consider When Updating My Estate Plan?

For clients with an existing estate plan, these articles help to delve into some of the common estate plan issues that require a substantial change to the estate plan.

- Separation/Divorce Checklist – Client-Facing
- Unborn Children, Expectant Parents, and Parents Who Plan To Have More Children
- Blended Family Considerations
- Incapacitation Checklist For Clients Or Health Care Agents

Starting the Estate Planning Conversation with fpPathfinder

Navigate Estate Planning topics with confidence by using fpPathfinder to start the Estate Planning conversation.

- Use the free fpPathfinder checklists to prepare for a client conversation. Your client doesn't even need to know you're using a checklist to guide the conversation. Lean on the checklist to create your agenda or brush up on Estate Planning concepts.
- Send the free fpPathfinder checklist to your client so they can review it with their spouse before they meet with you. That can help alleviate any surprise questions when they come to meet with you (e.g., "Who will raise the children?").
- Begin the Estate Planning conversation with two free fpPathfinder email templates (Creating An Estate Plan and Updating An Estate Plan).

Level up the planning experience by incorporating Estate Planning into your business:

- Position yourself as the expert among your clients and prospects by sharing versions of these checklists branded with your logo.
- Create a consistent and easily repeatable planning experience by sharing interactive versions of these checklists prior to the client meeting.
- Access 100+ checklists, flowcharts, and summary guides that simplify complex financial planning concepts.

Sign up for fpPathfinder and receive a 10% discount off your first year of membership when you use this registration link.