

PRODUCT ORDER FORM

SPECIAL PRICING CONFERENCE ATTENDEES

Step-by-Step Practice-Building Trainings	Regular Price	Conference Price	Total
Volume 1 – Business Infrastructure Training	\$2,995	\$2,245	
Establish a Firm Customer Service Process and See Your Profits (and Quality of Life) Dramatically Improve!	\$349	\$260	
10 Steps to Successfully Finding, Hiring, Training & Managing Excellent Support Staff	\$349	\$260	
The 10 Steps You Need to Know to Find, Hire, Train, Manage & Keep Great Associates	\$349	\$260	
A Proven Time Management System for Estate Planning Attorneys (As Well As Other Professionals & Your Staff!)	\$349	\$260	
The Proven System for Holding Efficient and Productive Meetings with Associates and Staff	\$349	\$260	
10 Steps to Setting Firm Revenue Goals (and Using These Goals to Achieve Regular Monthly Profits)	\$349	\$260	
9 Steps for Successfully Compensating & Incentivizing Associate Attorneys	\$349	\$260	
8 Steps to Setting Up Bonuses for Support Staff That Are Legal, Ethical and Motivate Them	\$349	\$260	
How to Legally & Ethically Discipline and Terminate Employees (or Hopefully Rehabilitate Them!)	\$349	\$260	
How to Set Up & Successfully Utilize Satellite Offices	\$349	\$260	
Managing a Successful Estate Planning Practice Through the Use of Metrics	\$349	\$260	
Volume 2 – Marketing Training	\$2,995	\$2,245	
Successful Initial Client Interviews & Appointment Closing Tips Package (includes 2-part training program and modifiable Client Meeting Forms)	\$795	\$395	
Convert Prospects with Other Attorneys' Trusts Into Clients!	\$349	\$260	
The GREAT Debate: The Client Maintenance Plan vs. The Free Service Package (includes 2-part training program with Jeffrey M. Matsen, J.D.)	\$399	\$299	
Generate More Clients From Your Existing Clients - - A Tested and Proven System That Actually Works!	\$349	\$260	
The 10 Key Planning & Marketing Steps for Successful Seminars	\$349	\$260	
Proper Staff Support - - The Days Before the Seminar, During the Seminar & Immediately Afterwards	\$349	\$260	
Successful Speaker Presentation Techniques	\$349	\$260	
Developing Successful Estate Planning Attorney-Financial Advisor Referral Relationships Package (includes 2-part training program and modifiable Referral Forms)	\$995	\$695	
Developing An Exit Strategy: How To Properly Merge, Acquire & Sell a Practice Package (includes marketing materials, checklists, sample contracts and more!)	\$795	\$495	
The Ultimate Practice-Building Training Library (includes both Volumes 1 & 2 and modifiable forms, <u>PLUS</u> registration to The Ultimate Level™ Online or Live Training Program)	\$4,995	\$3,495	

The Ultimate Level™	Regular Price	Conference Price	Total
ONLINE - Business Infrastructure & Marketing Training Course	\$1,495	\$995	
LIVE – November 2-4, 2017 in Redondo Beach, CA (LIMITED AVAILABILITY)	Varies	EARLY BIRD!	
LIVE – February 1-3, 2018 in Redondo Beach, CA	Varies	EARLY BIRD!	

Other Marketing & Sales Tools and Trainings	Regular Price	Conference Price	Total
The A-Z Guide to Seminar Marketing for Estate Planning Attorneys	\$895	\$670	
“How to Market & Sell More IRA Beneficiary Trusts” Training	\$199	\$149	
One-on-One Seminar Marketing Consultation with Kristina Schneider (includes: Two 60-minute sessions)	\$995	\$495	
Corporate & Private Group Seminar Training Package	\$295	\$220	
“The Top 10 Estate Planning Mistakes People Make” Free Report for Consumers	\$349	\$260	

Retail Seminar Marketing Packages (for Clients & Prospects)	Regular Price	Conference Price	Total
The Basic Living Trust Seminar (including 2017 Update)	\$1,895	\$795	
The Top 10 Estate Planning Mistakes Seminar	\$1,895	\$495	
The IRA Inheritance Trust® Seminar	\$1,695	\$495	
The Client Trust Review Seminar & Marketing Package	\$1,695	\$495	
The Successor Trustee Seminar	\$1,695	\$495	
Estate Planning for Rental Real Estate Owners Seminar	\$1,695	\$495	
The Personal Residence Trust Seminar	\$1,695	\$495	
Estate Planning for Physicians Seminar	\$1,695	\$495	
The Ultimate Pet Trust Seminar Marketing Package	\$1,295	\$495	

SUBTOTAL (for Page 1)

Wholesale & Continuing Education Seminars (for Professionals)	Regular Price	Conference Price	Total
Estate Planning 101 Seminar	\$1,695	\$495	
The Unique (and Little-Known) IRA Inheritance Trust® Seminar	\$1,695	\$495	
Top 10 IRA Planning Mistakes CPAs Make Seminar	\$1,695	\$495	
Top 10 Pre & Post-Mortem Estate Planning Mistakes CPAs Make Seminar	\$1,695	\$495	
The Top 22 Overlooked Uses of Life Insurance Seminar	\$1,695	\$495	
Everything You Need to Know About QPRTs Seminar	\$1,695	\$495	
Grantor Retained Annuity Trusts ("GRATs") Made Simple Seminar	\$1,695	\$495	
The ABC's of ILITs Seminar	\$1,695	\$495	
The Little-Known "Capital Gains Bypass Trust" ("CRT") Seminar	\$1,695	\$495	
SUBTOTAL (for Page 2)			
SUBTOTAL (from Page 1)			
SUBTOTAL (from Pages 1 & 2)			
MULTI-ITEM DISCOUNT (10% for 4+ ITEMS)			
SHIPPING & HANDLING			FREE
GRAND TOTAL			



CUSTOMER INFORMATION

SHIPPING INFORMATION	
Name:	_____
Company:	_____
Address:	_____ _____
Phone:	_____ E-mail: _____

PAYMENT OPTION	
<input type="checkbox"/>	Single Payment of \$ _____ (as shown in "GRAND TOTAL")
<input type="checkbox"/>	3-Month Payment Plan: "GRAND TOTAL" divided by 3 = _____ + \$10 = _____ x 3 months

PAYMENT INFORMATION	
Credit Card Type:	<input type="checkbox"/> Visa <input type="checkbox"/> MasterCard <input type="checkbox"/> Discover
Name on Credit Card:	_____
Credit Card No.	_____ Exp. _____ CID: _____
Billing Address:	<input type="checkbox"/> Same as above _____ _____ _____
Authorized Signature:	_____ Date: _____

***Special Conference Prices Only Available Until
12pm on Friday, October 6, 2017***

All product orders will be processed within 7 to 10 business days.