ULTIMATE

ESTATE PLANNER

UNLOCKING YOUR PRACTICE'S POTENTIAL™

HOW WE HELP ESTATE PLANNING ATTORNEYS

1.866.754.6477

www.UltimateEstatePlanner.com

FIRST, A LITTLE BIT ABOUT WHO WE ARE...

The Ultimate Estate Planner, Inc. was formed in 2004 by nationally renowned estate planning attorney, Philip J. Kavesh, under the business name, The "Missing Link" Boot Camp, Inc. The company was initially created to provide estate planning attorneys and financial advisors an intensive, all-inclusive, 2-day live training program. Through this training, both advisors were linked together to implement new, cutting-edge trust products and effectively learn how to create a successful multi-disciplinary model, integrating both estate and financial services under one roof.

However, starting in 2010, the company expanded upon these original Boot Camps to provide practical, tested and proven technical and marketing products to help estate planning professionals of all kinds - - attorneys, financial advisors, CPAs, and life insurance agents - - throughout the country build their practices. The Ultimate Estate Planner, Inc. offers a variety of resources to estate planning professionals, including educational teleconferences with some of the nation's leading experts on a variety of topics, unique and cutting-edge legal document forms like the IRA Inheritance Trust®, seminar marketing products, practice-building tools, and much more!

All of the products, programs and services available through The Ultimate Estate Planner are provided by practitioners that have successful estate planning practices and who are actually in the trenches, working with clients and running their own businesses.

The products and offerings of The Ultimate Estate Planner are derived from a long-time aspiration of Phil Kavesh's to give back to the estate planning community and save his fellow colleagues a great deal of time, expense, and headaches of having to learn by trial-and-error. The Ultimate Estate Planner helps give estate planners the resources they need to provide their clients the best possible estate planning available.

What you need. When you need it. At a reasonable price.

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FREE MONTHLY E-MAIL NEWSLETTER


ULTIMATE

December 2016 Newsletter

IN THIS ISSUE

The Viability of Delaware Dynasty Trusts After the Kloiber Case

6 Ways You're Holding Yourself (and Your Firm) Back Without Even Knowing It!

Investment Opportunities Involving Private Foundations and Pension Plans

FREE WHITE PAPER - What a Donald Trump Presidency Means for Estate Planning

FREE WEBINAR - Trump Wins:

What a Donald Trump Presidency Means for Estate Planning

By Jeramie Fortenberry, J.D., LL.M. (Taxation)
Executive Editor & Legal Education Faculty, WealthCounsel, LLC

In a surprising upset, Republican candidate Donald J. Trumpdefeated Secretary Hillary Rodham Clinton on November 8, 2016, to become President-elect of the United States. Republicans maintained a majority in the Senate and the House of Representatives, creating alignment between the White House and Congress and paving the way for Republican-backed legislation.

The 10 Biggest Mistakes Estate Planning Attorneys Make - - Running Their Business!

By Philip J. Kavesh, J.D., LL.M. (Taxation), CFP®, ChFC, California State Bar Certified Specialist in Estate Planning, Trust & Probate Law

Over the past 35 years, I have been blessed with a successful estate planning practice, as well as with the opportunity to help many other attorneys build or improve theirs.

Based on that real-world experience, I have compiled what I believe to be the ten most common mistakes that I've seen most estate planning attorneys making that keep them from enjoying more financial success and a

Every month, over 50,000 fellow estate planning colleagues receive a free monthly e-mail newsletter that covers an array of relevant topics that pertain to estate, tax, financial, and life insurance planning, as well as marketing and practice-building topics. The newsletter features some of the nation's leading experts, including names like Steve Oshins, Marty Shenkman, Robert Keebler, Jonathan Blattmachr and much more!

To subscribe to our free monthly e-mail newsletter, please visit our website at www.UltimateEstatePlanner.com.

MONTHLY TAX & ESTATE PLANNING UPDATE

There is no doubt that change is certainly coming in 2017 and in the years to follow. That is why it is important that now, more than ever, estate planning professionals are taking extra care to keep abreast and on top of all of these changes. But, who has time to sift through all of the lengthy law journals and publications? This is why we have enlisted the help of nationally renowned CPA and tax expert, Robert Keebler, and his team of associates at Keebler & Associates, LLP. You have the option to choose between either a condensed, "what you need to know" bulletin or an audio podcast (or both!). These are e-mailed directly to you once available each month. Subscribers will also receive various interim updates and audio podcasts throughout the month, in addition to discounts to upcoming educational programs.

And, for those that are interested, you also have the unique option to sign up for a premium subscription which allows you to distribute the bulletin or podcast to your network of local professional referral sources and centers of influence. For more information, go to www.UltimateEstatePlanner.com.

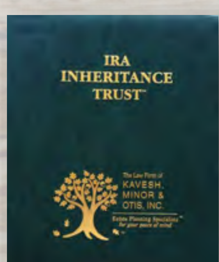
EDUCATIONAL TELECONFERENCES & ON-DEMAND PROGRAMS

Every month we offer educational teleconferences to the estate planning community. The intention is that our topics are timely and relevant and will leave participants with practical, real-world application to immediately take back into their practice and implement. All of our educational teleconferences become available post-broadcast in our On-Demand Library. Visit our website to check out the variety of educational programs available.

UNIQUE LEGAL DOCUMENT FORMS & TECHNICAL TRAINING PACKAGES

We have an array of unique legal document forms available for purchase. All of our legal document forms are available for a one-time licensing fee and include modifiable Microsoft Word documents.

The Personal Asset Trust℠ (with Complete Revocable Living Trust Forms)
The IRS-Approved Standalone IRA Beneficiary Trust—The IRA Inheritance Trust®
The Successor Trustee Manual
The PAT Beneficiary Manual
The Flexible Irrevocable Trust
The Personal Residence Trust ("QPRT")
The Ultimate Pet Trust by Eden Rose Brown, J.D.
The Single Member LLC ("SMLLC") by Mason D. Salisbury, J.D.
The Joint Exempt Step-Up Trust ("JEST" Trust) by Alan Gassman, J.D.
The Optimal Basis Increase Trust ("OBIT" Trust) by Edwin J. Morrow, III, J.D.



PRACTICE-BUILDING & MARKETING TRAINING

Are you stressed out running your own law practice? It's okay, most solo practitioners are. When it comes to running your own law practice, there are a number of details that you simply were never taught in law school. *Let us help.*

The Ultimate Level™ Online Training Course

Estate planning attorney, Philip Kavesh, has utilized his over 35 years of running his own successful law practice, along with a great deal of his time and money for costly trial and error, to help out his fellow estate planning attorneys. Thus, Phil put together a 2-day live training program called, "The Ultimate Level™". And now, to make it more convenient for practitioners and affordable to train their key staff members, this training is now available online! You will get 7 hours of training, plus a variety of forms and tools to use in your practice. For more details, visit www.TheUltimateLevel.com.

The Ultimate Practice-Building Library

From The Ultimate Level™ training, we were asked to develop a much more in-depth, step-by-step training on a number of the topics covered. Therefore we developed what is now called The Ultimate Practice-Building Library, which features more than 40 hours of detailed training on the following topics. Each program is a minimum of 90 minutes and includes handout materials, audio recording, and a number of exhibits and accompanying forms, checklists, and practical tools to use right in your practice.

BUSINESS INFRASTRUCTURE TRAINING PROGRAMS

Establish a Firm Customer Service Process and See Your Profits (and Quality of Life) Dramatically Improve!

10 Steps to Successfully Finding, Hiring, Training & Managing Excellent Support Staff

The 10 Steps You Need to Know to Find, Hire, Train, Manage & Keep Great Associates

A Proven Time Management System for Estate Planning Attorneys (As Well As Other Professionals & Your Staff!)

The Proven System for Holding Efficient and Productive Meetings with Associates and Staff

10 Steps to Setting Firm Revenue Goals (and Using These Goals to Achieve Regular Monthly Profits)

8 Steps to Setting Up Bonuses for Support Staff That Are Legal, Ethical and Motivate Them

How to Legally & Ethically Discipline and Terminate Employees (or Hopefully Rehabilitate Them!)

How to Set Up & Successfully Utilize Satellite Offices

Managing a Successful Estate Planning Practice Through the Use of Metrics

MARKETING TRAINING PROGRAMS

Successful Initial Client Interviews & Appointment Closing Tips Package
(includes various client forms and questionnaires, engagement letter, and more!)

Convert Prospects with Other Attorneys' Trusts Into Clients!

The GREAT Debate: The Client Maintenance Plan vs. The Free Service Package

Generate More Clients From Your Existing Clients - - A Tested and Proven System That Actually Works!

The 10 Key Planning & Marketing Steps for Successful Seminars

Proper Staff Support - - The Days Before the Seminar, During the Seminar & Immediately Afterwards

Successful Speaker Presentation Techniques

Developing Successful Estate Planning Attorney-Financial Advisor Referral Relationships Package
(includes forms, disclosures and a sample contract)

Developing an Exit Strategy: How to Properly Merge, Acquire & Sell a Practice Package
(includes forms, contracts, checklists and more!)

How to Manage a Successful Marketing Plan for Your Estate Planning Practice with Metrics

For pricing and details, visit our website at
www.UltimateEstatePlanner.com

RETAIL SEMINAR MARKETING PACKAGES TO TARGET PROSPECTIVE & EXISTING CLIENTS

Seminar marketing is one of the most efficient and effective ways to generate new clients into your estate planning practice, whether you market directly to prospective clients (retail seminars) or you market to local professional referral sources (wholesale continuing education seminars). The hard part about seminars is finding the time to put together all of the items needed to conduct a successful seminar. We have a number of seminar marketing packages to target prospective and existing clients on an array of topics (as shown below).

Each seminar marketing package comes with PowerPoint presentation, direct mail marketing materials (with the exception of Southern California practitioners), seminar outline and a variety of seminar handouts and tools. Most seminars include a script for each PowerPoint slide - - and some even include a recording!

The Basic Living Trust Seminar

The Top 10 Estate Planning Mistakes Seminar

The IRA Inheritance Trust® Seminar

Estate Planning for Rental Real Estate Owners Seminar

The Personal Residence Trust Seminar

The Ultimate Pet Trust Seminar

CONTINUING EDUCATION SEMINARS TO TARGET PROFESSIONAL REFERRAL SOURCES

Continuing education seminars are a great way to target potential professional referral sources in your area (whether it's CPAs, financial advisors or life insurance agents). In order to do this, you've got to get in front of them, present yourself as an authority figure in the field of estate planning, and network with them. A perfect way to accomplish this is by hosting a series of "Lunch and Learn" events!

Each seminar marketing package comes with PowerPoint presentation, direct mail marketing materials, seminar outline, a variety of seminar handouts and tools, including information about how to offer continuing education credit for various professionals. Most seminars include a script for each and every PowerPoint slide and some even include a recording!

Estate Planning 101 Seminar

The Unique (and Little-Known) IRA Inheritance Trust® Seminar
(one for CPAs and one for Financial Advisors)

The Top 10 IRA Planning Mistakes Seminar

The Top 10 Pre-Mortem & Post-Mortem Estate Planning Mistakes CPAs Make Seminar

The Top 22 Overlooked Uses of Life Insurance Seminar

Everything You Need to Know About QPRTs Seminar

Grantor Retained Annuity Trusts ("GRATs") Made Simple Seminar

The ABC's of ILITs Seminar

The Little-Known "Capital Gains Bypass Trust" Seminar

OTHER MARKETING & SALES TOOLS

In addition to complete seminar packages, we have an array of other marketing materials to help you generate new and repeat business including, but not limited to:

The A to Z Guide to Seminar Marketing for Estate Planners

Corporate & Private Group Seminar Training Package

Client Survey & Referral Generator Package

"The Top 10 Estate Planning Mistakes People Make" Free Consumer Report

"How to Market & Sell More IRA Beneficiary Trusts" Training Program

"How to Handle the Q&A Session at the End of a Living Trust Seminar" White Paper

ASSET PROTECTION & TAX PLANNING TOOLS

It's important now, more than ever, that you're offering your clients the best possible planning available. In addition to the standard Living Trust and Will planning, it's important that attorneys are also integrating asset protection and tax planning strategies. We have a number of tools available that help practitioners better understand and explain these more complex planning strategies.

Steve Oshins' Asset Protection & Advanced Estate Planning Marketing Kits

These kits include an audio interview, transcript, modifiable PowerPoint slides, and (if available) a technical educational program for each of the following 6 strategies.

Domestic Asset Protection Trusts ("DAPTs")

Grantor Retained Annuity Trusts ("GRATs")

Dynasty Trusts

Completed Gift DAPTs

Installment Sales to an Income Tax Defective Dynasty Trust

Limited Liability Companies (with Maximum Discounting)

Whether you're an attorney, CPA, financial advisor, or insurance agent, I consider the Robert Keebler Chart Bundle Package a "must-have" for your tool kit. Bob Keebler has a unique talent for developing tools and practice aids that have allowed me to comprehend the most complex tax, financial and estate planning concepts, and articulate them to both clients and colleagues alike. For years, I have been on a quest for products such as these, and haven't been able to find them anywhere else!"

Rich Burchill, CPA
Raleigh, North Carolina

Robert Keebler's Tax Planning Charts

Each color chart is laminated and comes printed full-size (11" x 17"). You also receive a PDF copy of each chart. There's also an option to for personal branding of each chart (for an additional fee).

The Top 10 Tax Planning Ideas for 2017 Chart

75 Best Income Tax Strategies in 2017 Chart

Generation Skipping Transfer Tax Chart

DrawDown Strategies Chart

Tax Asset Classes Chart

Bracket Management Chart

Capital Gains Harvesting Chart

Personal Exemption Phaseout & PEASE Impact Chart

Applying the 3.8% Net Investment Income Tax Chart

Understanding the Net Investment Income Tax Chart

Traditional IRA Distribution Flowchart

Roth IRA Distribution Flowchart

Roth Quadrants Chart

Roth IRA Conversion Decision Chart

For pricing and details, visit our website at www.UltimateEstatePlanner.com

CLIENT MEETING FORMS

You probably already have a number of your own internal forms that you've developed and are using when meeting with your clients. However, there may be some forms that you have never heard of or have even considered. There's also an opportunity to improve upon the current forms that you're using. Rather than reinvent the wheel, we have made it very easy with over 30 forms that are available for a one-time licensing fee.

ESTATE PLANNING FORMS

Estate Planning Questionnaires (3 versions)
Estate Planning Engagement Letter
Estate Planning Client Agreement to the Presence of Others
Checklist for Reviewing Another Attorney's Trust
EP Acknowledgement of Information Given
Family & Friends Disclosure (H&W Potential Conflict of Interest)
Divorce Checklist for Estate Planning Clients

ESTATE ADMINISTRATION FORMS

Estate Administration Fee Agreement
EA Acknowledgement of Information Given
Estate Administration Client Agreement to the Presence of Others
Estate & Trust Administration Disclosure Form
Trustee Duties Upon Trust Funding Acknowledgement
Co-Trustee Potential Conflict of Interest Disclosure & Consent
Acknowledgement of Information Given for Trustee Notification
Acknowledgement of Information Given for Portability

FINANCIAL ADVISOR REFERRAL FORMS

Client Permission Slip
Consumer Rights Disclosure
Client Financial Assessment (Lobby Quiz)

THE LIVING TRUST OWNER'S MANUAL

Full Color Flow Charts (Single & Married Trusts)
Owner's Manual Inserts & Coverpages
Client Intake Form for Drafting Estate Plan
Drafting Notes Summary Page
Trust Identification Card

IRA BENEFICIARY TRUST OWNER'S MANUAL

Full Color Flow Charts (Single & Married Trusts)
Owner's Manual Inserts & Coverpages
Acknowledgement to Contact IRA Custodian
Client Intake Form for Drafting IRA Trust
IRA Trust Disclosure Form
Beneficiary Designation Forms and IRA Custodian Hold Harmless Language
Trust Protector Exercise of Power to Limit Potential Beneficiaries
Renunciation of Trust Protector Power to Convert Conduit Shares to Accumulation Trust Shares Form
Post-Mortem Checklist for IRA Trusts

COACHING & CONSULTING

It's great to have tools and resources to help you build, develop, and grow your practice. However, getting the most out of you and your practice sometimes takes a little bit more than just having the tools available. Having some one-on-one attention to answer any questions you have, provide you guidance on what to do, and explore options with the other resources available to you, will help you get yourself to the next level of success. The benefit of getting some personal coaching with an expert is clear: ***You will see better results.***

We are pleased to offer a number of personalized training, consulting, and coaching services to our customers. Some are specific to seminar marketing, executive assistant support, the general estate planning practice, and even managing your practice personnel. Our team is trained to assist our customers in determining what they need and how best we are able to assist them.

Contact us today to learn more about what coaching services might be the most beneficial to you!

Over the past few months, I have purchased some products and services from The Ultimate Estate Planner and I will definitely continue to do so. The staff at Ultimate Estate Planner are such a joy to work with and the materials that have been provided to me have allowed me to help my clients. Thank you! Keep up the great work that you all provide the estate planning community!

HOWARD STROSS
Estate Planning Attorney
Oldsmar, Florida

I am proud to offer my clients what I consider to be the finest and most comprehensive estate planning services anywhere. My practice is based on innovative legal documents and the revolutionary seminar marketing packages available through The Ultimate Estate Planner. I have been an avid follower Phil Kavesh's systems since the 1990's. It's helped me develop my entire practice. If you're not using these materials, you're clearly missing the boat!

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