



Estate Planning Newsletter

THE SPACE BETWEEN

Happy New Year! There are very few things we have absolute control over. The one we do have control over is the thoughts we think that shape our attitude. An often quoted expression, “be careful what you think as it may just happen” says all that needs to be said relative to this point.

Setting New Year’s resolutions is a very common practice. Along with any resolution you may set, take time to set some financial “life changing” goals. No one plans to not achieve their goals but rather they fail to plan for what they have to do to achieve the goals. Invest the time to break your goal down into measureable steps for each week and then make sure you do the things you planned to do.

Steps to success doesn’t mean the goal is, “I’m going to sell \$200 K in annuities this week. Instead, plan your activities around how many calls you are going to make and how many clients you are going to reach out to if for no other reason than to say hello. When you are active it’s kind of like stirring the pot. Your actions will stir your emotions and when you are thinking positive when stirring your emotions, magical things happen. Positive thoughts coupled with enthusiasm makes for a powerful one-two punch that will move you forward toward your goals.

You know our business, it is all about planning and how critical it is for a family when it comes to protecting the integrity of their estate. You can invest years of your life working with clients making sure their financial plan is “solid” but when you don’t incorporate the estate planning piece into the equation, you are leaving the family in a “not so desirable spot”. The day will come when they have to deal with the estate and doing that without a plan will prove to be one of the most stressful and costly things they ever have to experience. And it is all so unnecessary provided you educate them on making the best choice and that is having their own plan versus the government’s plan. It is a no brainer! By the way, do you have your plan?

You have probably heard this quote, “fortune favors the brave”. Ask yourself two questions, would your clients be comfortable with where their estate is if something happened to them tomorrow? No one knows when the future will be no more. Would they prefer their legacy be a bright light for their family or a dark shadow? Trust me, these are brave questions that will move your clients to think. You are helping them and once it is done, they will show their appreciation.

The six inch difference is the distance between your ears. Your most important skill is to be a great listener. Being a careful listener will enable you to understand what people are thinking and what they care about. Caring and showing that you care is powerful.

I dare you to be more proactive in your practice by making estate planning an integral part of your conversations with clients and don’t stop until they get it done. Your income will go up and you will have more referrals than ever.

Commit yourself to making 2022 a personal year of growth. Set lofty goals, plan your activity, get excited and see what happens. I guarantee this process and way of thinking will not fail you.