



A GUIDE TO PRESENTING

A Dynamic Estate Planning Seminar or Webinar



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Introduction

Dynamic Estate Planning Seminar or Webinar

Congratulations on making the decision to grow your business through estate planning seminars and webinars. I've spent the better part of my 34 years in the industry, first as an advisor, then as a branch manager, and now with Advice2Advisors as a coach, presenting seminars.

I've done hundreds of financial seminars and webinars over the years, speaking to tens of thousands of attendees, and over that time I've found that Estate Planning seminars were the most beneficial of all. They attracted the type of attendees that were motivated to take action, and they had the financial means to become great clients. And, because they entrusted me with their estate planning - their LEGACY planning, in fact - they became the most loyal clients of all. With that loyalty came the best referrals and introductions imaginable.

We at Advice2Advisors look forward to helping you enjoy a very similar level of success. Now let's get to work!

Dan.



Step #1:

Know Your Target Market



Step #1: “Know Your Target Market” sets the stage for all that’s going to follow.

Because you have chosen to present an estate planning seminar/webinar, the Target Market your attendees - are very likely to be Retirees, Empty Nesters, mature Professionals and Business Owners; individuals with a real interest in the subject, who have the assets and the needs to involve themselves in estate planning.

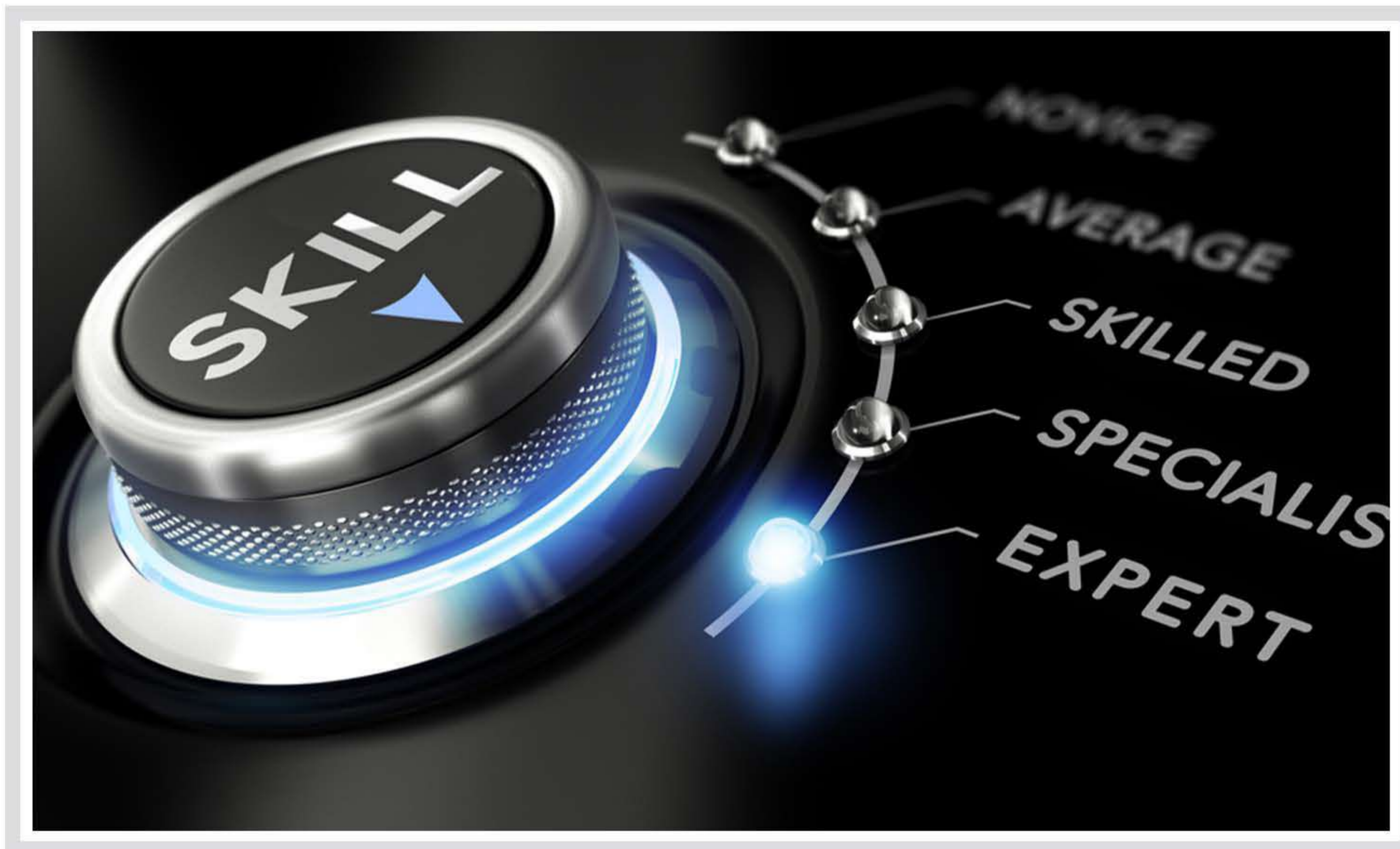
Do as much pre-work as possible (read articles and research) on this cohort’s attitudes, interests, hobbies, finances, needs, pains, etc. The more you can talk to their position in life, the more they will be drawn to you.

Many of these attendees will already be working with financial advisors. This is good for you as it indicates that they are not getting the estate planning information or service from that advisor. This is your opportunity to shine in comparison; make the most of it.

A word of caution: some attendees will ask you why they’ve never heard what you’ve discussed from their current financial advisor. This is the time to show your professionalism and expertise. We never malign their existing advisor as they will only become defensive. A simple response could be something like: “Perhaps estate planning is not their area of expertise.” Simple, professional, and it sets you up as **THE ESTATE PLANNING EXPERT.**

Step #2:

Become the Expert



Step #2: “Become the Expert” . . . because people like to work with experts, and it’s easier to gain trust and influence when you’re perceived as the expert. And, this all starts long before the seminar takes place.

Some Questions to Ask Yourself:

- Have I begun to position myself as the expert to this cohort?
- Does my website support my expertise?
- What about my Social Media: My LinkedIn, Facebook, Instagram, Twitter (whatever you use and put out to the market) -- do they support my expertise?
- Does my seminar attendee package bio portray me as the expert to the attendees?
- Do I project as an expert? Do I sound confident and assured in my knowledge? Do I instill confidence in myself and others?

If you answered “No” to any of these questions, it’s time to step it up and become the expert to your clients and prospective clients. Thankfully, presenting professional financial seminars and webinars is one of the quickest and easiest ways to declare your expertise!

“But what if an attendee asks me a question that I don’t have the answer to?” No problem!

Look them in the face and say: “Great question . . . haven’t heard that one before . . . give me your contact information and I’ll get the answer to you within 24 hours.” And then get them the information. Book an appointment at the same time.

Experts don’t bluff . . . they get the information they don’t readily know by doing the research or finding someone that does have the answer, like your estate attorney.

Step #3:

Work Your Prospecting Plan



Step #3: “Work Your Prospecting Plan”. Prospecting - or the lack of it - is the primary cause of most advisors avoiding seminar marketing. It’s rarely the fear of public speaking that stops an advisor from trying seminars. That’s fairly easy to overcome, you just start with small workshops or seminars and fairly quickly advance to medium and large seminars. The real problem is that most financial advisors don’t know how to get attendees to the seminar or, they’ve tried before and failed miserably. Or, they’ve been successful seminar presenters but no longer want to do the “grunt” work of filling the room. Not surprising, really. Think about it, did you become an advisor to spend all of your time marketing seminars or being an event coordinator? Not likely.

I have 2 thoughts about the value of doing seminars:

- They provide you with great opportunities to gain **new clients** very quickly.
- They provide you with the opportunity to **gain hundreds, and even thousands, of new prospects over time**. Put those attendees who didn’t immediately book an appointment into your marketing “drip list” and continue to contact them and invite them to future events . . . until they become clients or ask to be taken off of your mailing list.

White Glove does all of the marketing up-front, as well as the event coordinating. They can even help with the follow-up. You just have to hone your presentation skills and never waste a lead.

Step #4:

Deliver an Engaging Seminar



Step #4: “Deliver an Engaging Seminar” is **ABSOLUTELY CRITICAL**. You can either look like a **SUPERSTAR** - if you are well prepared - or like a **DUD**, if you are winging it!

Let me state from the beginning: **Be Product Agnostic** during the seminar. Attendees don’t want to feel as though they’re being sold a product.

Focus on Their **Goals**, Your **Strategies** and **Solutions!!!** Product will come into play when you are turning them into clients.

Back to Engaging:

Engage the audience **EARLY**:

- I try to meet as many of them as possible at the door and introduce myself.
- I like to have a Trivia Questionnaire in the Attendee Package (Cohort Specific) - lighthearted and FUN - or a Brainteaser at the very beginning of the PowerPoint presentation; this is a great way to get audience participation, early - the Brainteaser even works in webinars.
- When you ask the audience questions such as “How many of you have ever . . . “, put up your own hand as though you are answering the teacher. This will prompt the attendees to also throw up their hands, again, getting that audience participation.
- **Look Professional:** different attire for different geographic locations, but always dress well, if not better, than the attendees.

- **Look Relaxed:** I now find it easier to speak to hundreds of strangers at seminars than I do to small groups of people I know because of how well prepared I am for my seminars.
- **SMILE!** It's one of the quickest ways to gain trust.
- **Have an Engaging Presentation:** PowerPoint - pictures & graphs versus words. Delivery Matters: use deliberate pauses, ask questions, use **STORIES** for emphasis! (lots of online information on this).
- **Have a strong Power Opening:** Here's one that I use:

Welcome Ladies and Gentlemen. Thank you for joining us today. I'm sure that most of you have made the decision to be here to learn the Do's and Don'ts of Estate Planning:

- How to minimize taxes, and maximize bequests
- How to protect yourself, and your loved ones
- How to ensure your estate is distributed to your liking, and your capabilities

. . . and we will certainly discuss all of that.

But . . . what I would also like you to consider beyond Estate . . . is LEGACY . . . Your Legacy.

While the wealth you've accumulated over your lifetime will certainly be able to help others for years, possibly decades, the Legacy you begin to create today can impact lives for generations.

And, you have the ability to see some of that Legacy play-out in front of your very own eyes, if planned appropriately.

So . . . we've got a lot to cover . . . let's get started!

- **Don't Be a Talking Head!** Giving information and knowledge is not dispensing WISDOM. Dispensing WISDOM is your job. Challenge preconceived thoughts, ideas, and rules of thumb. Give the audience something to think about rather than just espousing facts, figures and rules of law. Have a philosophy about money, and estate and legacy planning.
- **GET TO THEIR EMOTIONS!** Research shows that emotions are the "fuel" of action. The action we want from our attendees is to book an appointment. By flipping "Estate" Planning to "Legacy" Planning early in the presentation, you can get them emotionally engaged and far more likely to seek out your expertise.
- **STORIES SELL!** Research shows that stories can impact people's motivation multiple times over facts and figures. Rather than discussing the words on a slide, tell a story that resonates with the audience. Have 5-10 mini-stories that you spread throughout your presentation and know which PowerPoint slide prompts the story.

- Talk to them about **getting to see their LEGACY play-out in front of their very eyes**. People think estate planning is all about what happens to their assets when they're dead. Make LEGACY Planning about what they could experience while they're still here. Have stories about parents and grandparents who have:
- Helped their children or grandchildren with the cost of education; possibly paid-off their student loans.
- Helped their children or grandchildren buy their first car, their first home.
- Took their children or grandchildren on trips . . . even trips of a lifetime.
- Surprised their children and grandchildren by reversing roles and giving the kids/grandkids checks on Mom's/Grandma's and Dad's/Grandpa's birthday.

Everyone has stories. Use your own family stories, stories from your clients, or borrow some that you've heard from other advisors, or even stories about famous people that you've read about.

Before you come to the closing, let them know again that they can book an appointment, now! Say something like:

As mentioned earlier, I'm going to save a few minutes at the end to take some questions. Obviously, some of you might have questions that are too personal to ask in front of the audience, so I've set aside a number of openings to discuss those questions, one-on-one, over the next two weeks. Some of you might want to have a full conversation on your own estate/legacy plan and, again, I'm happy to set aside time to have a complimentary discussion with you (then tell them how to book the appointment there).

- **Have a strong Power Closing:** Here's one that I use:

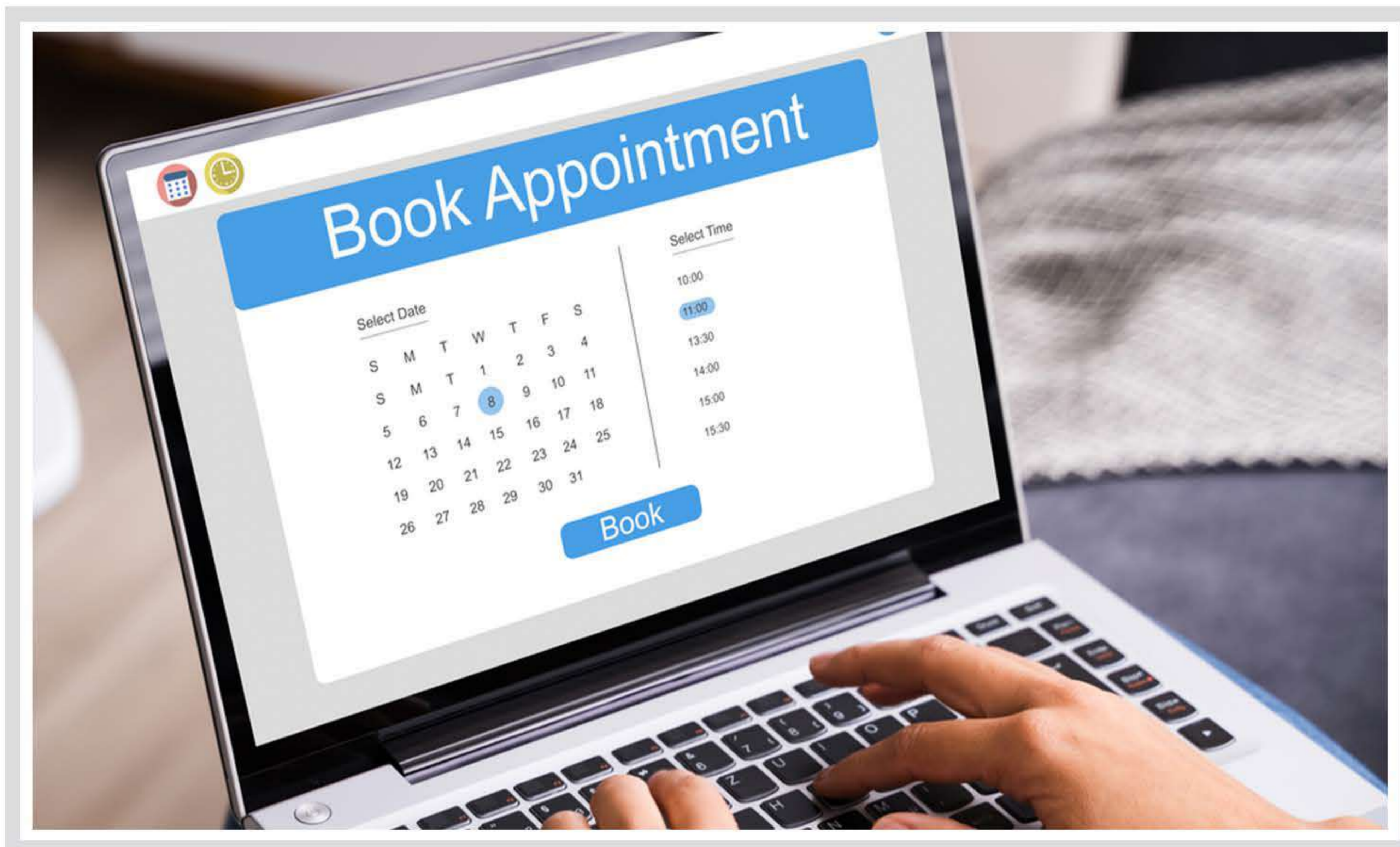
Ladies and Gentlemen: We've touched on a lot of points that you will need to seriously think about. Understand however, that if you go home today, and don't take immediate action in regard to your own planning needs, the ideas and strategies that we've discussed here today will begin to vanish from your memories within hours. In that regard, Thinking becomes the Enemy of Doing! For this past hour to have been of any value to you, you will need to make the decision now to take action.

Remember, estate planning shouldn't be scary, it shouldn't be overly complex, and it shouldn't be left too late. You have the control, and you have choices.

Let's turn Estate Planning into LEGACY PLANNING . . . and where possible, CHOOSE to see that LEGACY play out in front of you - you deserve it! Until next time, thanks for joining us and stay well.

Step #5:

Book the Appointments!



Step #5: “Book the Appointments”, is the Immediate Pay-Off! This is where you “strike while the iron is hot!” Again, it requires a Process.

Start early. Let them know from the beginning that you have set aside time over the next two weeks to meet with them for a complimentary session. Also mention that some of their questions might be too personal to ask in public, so you will make yourself available discuss those questions in person or over the phone.

Finish strong. As you come to the close of the session, let them know that you will be taking questions, but remind them of the opportunity to book the complimentary session.

Methods I've used:

1. **Evaluation Sheet** in Attendee Package. Along with other questions have a space on the sheet to book a face-to-face appoint, a virtual meeting or a phone call.
2. At the end of the presentation, direct your attendees to your **Assistant** at the back of the room to book an appointment.
3. Have yellow **Sticky Notes** on a wall with pre-set Dates and Times for appointments. Direct your attendees to grab one that fits their schedule, fill in their contact information and give it to your Assistant.

Make it easy for them to book an appointment with you. Don't give up on any Attendees until they give you a direct “NO THANKS”.

Step #6:

Follow Your Sales Process



Step #6: “Follow Your Sales/Business Process”, is all about the follow-up to the seminar or webinar, once you’re in the initial appointment, but it needs to be considered from the moment you decide to organize the seminar.

Structure your seminar to flow directly into your Initial Appointment and take your prospective client back to the seminar at the beginning of the appointment, metaphorically.

Build Rapport by:

1. **Re-establish** (the seminar discussion)
2. **Re-ignite** (the attendee’s concerns and goals) ***Ask: What, Which, Why,????
3. **Re-Engage** (the building of the future relationship: Expert and Future Client)

Have an AGENDA for the meeting that follows your Sales or Business Process.

End with a **CALL TO ACTION**.

These are the steps that I’ve been working and refining for the last 30+ years of seminar marketing. They’ve worked wonders for me and hundreds of the advisors that I’ve worked with. They will work for you as well.

I look forward to hearing about your seminar success.

Dan.



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