

The Business Side of Elder Law & Estate Planning

Session Goals

Why the Business Side Matters

- You can be the most compassionate attorney in town, but if your business systems and pricing are weak... you go broke.
- Today's goal: Build confidence in your pricing, marketing, and referral structure so you close more cases and serve more families.



Pricing Strategies That Maximize Revenue

 Presenter: Todd Whatley

Your Work Has Real Value

Estate Planning Isn't
Paperwork – It's Life
Protection

- Clients aren't paying for forms – they're paying to protect \$500,000
- When positioned right, a \$4,000 to \$20,000 fee is seen as a wise investment



Anchoring Value to Real Costs

Planning Type	Cost if They Don't Plan	Your Fee
No POA → Guardianship	\$5,000 - \$10,000	\$850 - \$1,500
Probate	\$25,000+ in fees & delays	\$4,000 - \$7,500
Nursing Home	\$120,000/year	\$8,000 - \$20,000 Medicaid Plan
Special Needs Error	SSI/Medicaid lost permanently	\$3,500 - \$6,500 SNT

“It’s substantially cheaper to plan now than to fix it later.”

Tiered Pricing Strategy - What I sell

- Tier 1 Simple POA Package bene designations to avoid Probate
- Tier 2 Basic Trust - No follow-up
- Tier 3 Comprehensive Trust + 1 Year Support
- Tier 4 Complex Asset Protection / Medicaid Plan

“This lets clients choose the level of planning they’re comfortable with — and it keeps you in control.”



The Psychology of Pricing

- Anchor in the expense of not planning or against a known cost you are avoiding.
- Show the “expensive” package first – then let lower packages seem affordable
- Present your pricing in writing, confidently
- Avoid the trap of itemizing everything – sell outcomes, not parts



Common Objections & Selling Trusts

Objection: “I Don’t Need a Trust”

Response Framework:

- “Let’s look at what you’re trying to accomplish...”
- “Do you want this to go to your kids directly and without protection?”
- “Do you want them to avoid court?”
- “Do you want to protect it from Medicaid or remarriage?”

Most objections are misunderstandings. Your job is to reframe the problem.





Objection: “That’s Too Expensive”

Anchoring Script:

- “Compared to probate or nursing home care, this is a fraction.”
- “What’s your peace of mind worth knowing your family won’t fight?”
- “What’s it worth to protect \$300,000 from being spent on care?”
- **SAY THE COST OF WHAT YOU ARE AVOIDING A MILLION TIMES WITHOUT BEING OBNOXIOUS.**

Close the Sale with Confidence

- Never apologize for your fee (rarely give discounts. You will be sorry you did, everytime.)
- Clients pay when they feel heard, safe, and guided
- Show your value with examples, not pressure



Marketing & Online Lead Generation

Your Online Presence is Your First Impression

Checklist:

- Mobile-friendly website
- Fast page load
- Clear call-to-action CTA
- Testimonials & trust badges
- FAQ and blog content to educate



SEO Google Ads + Local Reach

- Rank for “Elder Law Attorney Your City”
- Write keyword-rich blog content monthly
- Run ads targeting:
 - Adult children of aging parents
 - Retirees searching for asset protection
 - Local searches during crises (e.g., after diagnosis)
- Must now be aware of AI recognition. HUGE!!!



How to Convert Online Leads into Paying Clients

Funnel Steps:

1. Landing page with an offer (e.g., “Free 15-minute Call”)
2. Form with key info (age, concerns, assets)
3. Immediate contact from intake team
4. Send customized appointment reminders
5. Track where leads came from for ROI

Marketing Mistakes Attorneys Make

- DIY websites with no SEO
- Ignoring online reviews
- No nurturing system after initial inquiry
- Failing to capture contact info on site



OOPS...

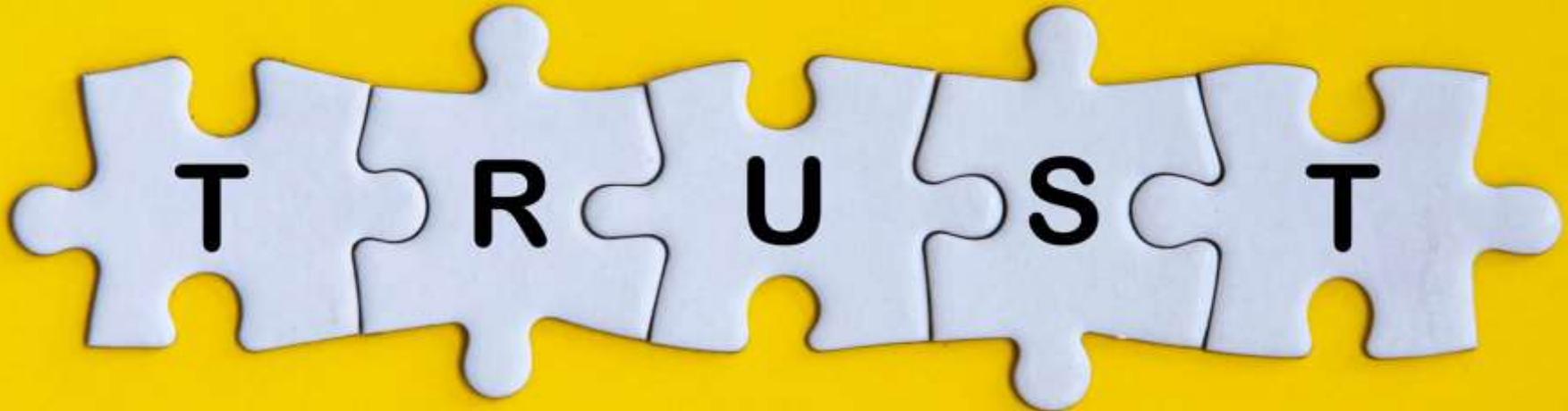
Building a Sustainable Referral Network

Referral Sources You Must Cultivate

Source	Value
Financial Advisors	Ongoing collaboration
CPAs & Tax Pros	Trust in complex planning
Nursing Home Social Workers	High-trust, high-need referrals
Funeral Homes & Clergy	Often first to hear the concerns
Real Estate Pros	Downsizing, crisis moves, asset transfers

Building Trust with Referral Partners

- Show up: In-person lunch, webinar, phone call
- Send them something: articles, updates, branded materials
- Share outcomes: “Here’s how we helped a shared client”
- Make it a 2-way street: refer when appropriate



Sample Script for Starting a Referral Relationship

“

“Hi, I’m Name with Firm . We help families plan ahead to avoid crisis – and we love to work with professionals like you. I’d love to schedule 20 minutes just to learn more about your work and how we can support each other.”

Nursing Home Contracts - Legal Minefields to Avoid

 Presenter: Todd Whatley

Hidden Landmines in Nursing Home Admissions

- “Responsible Party” language that creates unintended personal liability
- Arbitration clauses waiving the client’s rights to sue
- Assignment of income forms that compromise Medicaid planning



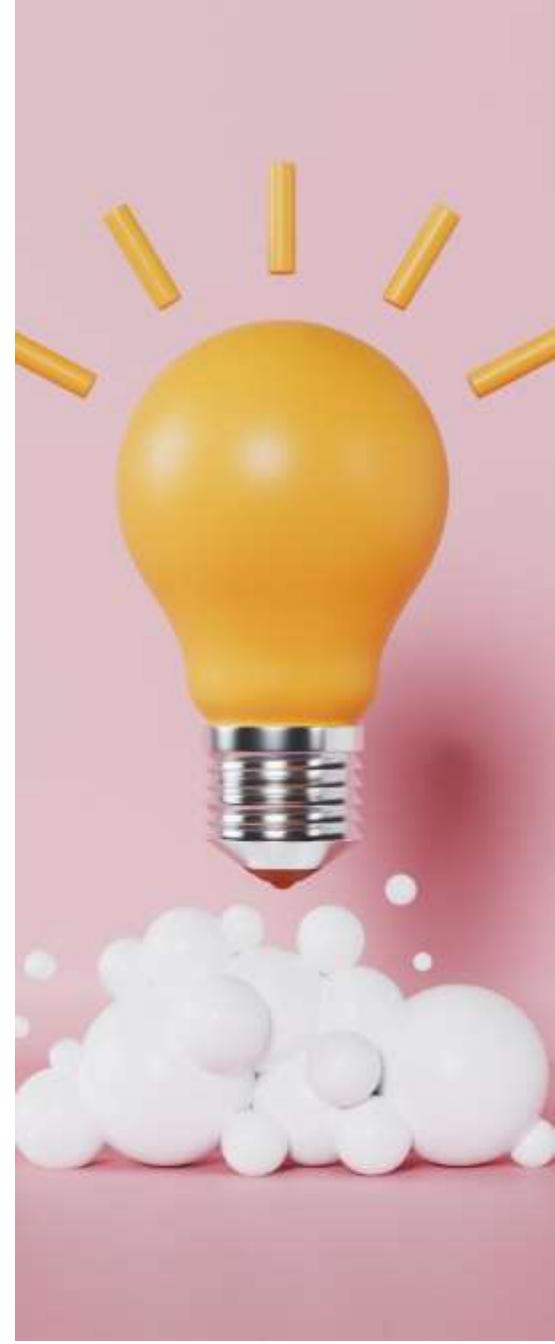


What to Teach Clients and Facilities

- NEVER sign as “Responsible Party” – sign only “as POA”
- Remove or cross out arbitration clauses where allowed
- Notify facility you are submitting a Medicaid application

Power Scripts for Families

- “I’m happy to help Mom, but I’m not taking on personal liability.”
- “Can we review this together with our Elder Law attorney before signing?”
- “We have a plan in place – we’re working with our advisor and attorney.”



Wrap-Up & Final Takeaways

- Price confidently – your work is valuable
- Objections are just questions in disguise
- Digital marketing + referral pipelines = scalable growth
- Know what's in every nursing home contract – and educate your clients