

# 90-Day Execution Plan Worksheet

*Launch Your Elder Law or Estate Planning Practice with Purpose and Profit*

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## PART 1: CLARIFY YOUR FOCUS

### Practice Area Focus:

- Estate Planning
- Elder Law / Medicaid
- Special Needs Planning
- All of the Above

### Top 3 Services I Will Sell:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Pricing Ranges for Each Service (List or Circle):

- POA Package: \$ \_\_\_\_\_
  - Trust Packages (Tiers 1–4): \$ \_\_\_\_\_ – \$ \_\_\_\_\_
  - Medicaid Planning: \$ \_\_\_\_\_ – \$ \_\_\_\_\_
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## PART 2: BUILD YOUR PIPELINE

### My Intake System Includes:

- Non-attorney coordinator script
  - Client info collection checklist
  - Process to get FA consent to join attorney meeting
  - FA + Attorney coordination template
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## PART 3: MARKETING & VISIBILITY

I will commit to hosting 1 of the following:

- In-person seminar
- Zoom/webinar event
- Facebook Live or video series

**Event Date:** \_\_\_\_\_

**Topic Title:** \_\_\_\_\_

**Who will co-host or promote it?** \_\_\_\_\_

## **PART 4: RELATIONSHIPS & REFERRALS**

**Referral Meetings to Book in the Next 30 Days:**

**Type of Professional Name Contacted? Meeting Date**

Financial Advisor

CPA or Tax Pro

Real Estate Agent

Funeral Director

Aging Care Specialist

## **PART 5: REVENUE TARGETS**

**My 90-Day Revenue Goal:** \$ \_\_\_\_\_

| <b>Metric</b>               | <b>Goal</b> | <b>Actual</b> |
|-----------------------------|-------------|---------------|
| New Intakes Scheduled       |             |               |
| Consults Held               |             |               |
| Cases Closed (High-Fee)     |             |               |
| Revenue from Planning Cases |             |               |
| Seminar/Event Attendees     |             |               |

## **PART 6: MY ACCOUNTABILITY SYSTEM**

**My Weekly Review Time:**

Day: \_\_\_\_\_ | Time: \_\_\_\_\_

**My Accountability Partner or Group:**

Name: \_\_\_\_\_

Contact: \_\_\_\_\_

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**PART 7: MY FIRST 3 ACTION STEPS THIS WEEK**

1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_
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## **SIGN & COMMIT**

I commit to executing this plan over the next 90 days to serve more families, grow my revenue, and build a sustainable Elder Law practice.

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_