



THINKING BEYOND™



Motivating Wealthy People to Plan

When professional advisors in the financial and legal industries see first-hand the work we do with our clients, they always ask us with intense interest—How are you getting these wealthy people to do all this?

A Planned Giving Officer

We once received a call from an attorney who was the head of planned giving at a major religious charity. He was a brilliant technician and was committed to his organization. During the past year, several of his wealthiest donors had retained us to take them through the Family Wealth Counseling process. The results we achieved were beyond the wildest dreams of these families. Millions of lost dollars were recovered and were now redirected to this planned giving officer's organization. After each report of a major unsolicited planned gift coming in, he would ask the donor, "Who has helped you do this?"

We were responsible. He was so excited that he called and asked if he could meet us the next time we were in town. The day arrived that we were to meet. We sat

down in his office and asked him what questions he would like to ask.

He said that he did not have any questions about the planning tools that we were using. He felt he knew them as well as we did. But the one question he had was "How are you getting my donors to make these major planned gifts? I have been talking with some of these people for decades about doing something like this,

but I have never been able to motivate them to action. What are you doing that is getting these people to make these kinds of substantial planned gifts?"

An Estate Planning Attorney

Some time ago we were meeting with one of the largest law firms in one of the largest cities in America. The firm had more than 50 estate planning attorneys in the trust and estate department. Our clients on this case were worth over \$40 million. We were meeting with the clients

and all the advisors at the law firm to begin implementing the master plan we had designed for them. All the advisors had already approved the plan, as had the couple. This meeting was to delegate whom

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was responsible for each part of the implementation.

After the meeting was over, a senior partner of the law firm took us aside to his personal office and said, “I just must ask you one question that is disturbing me. How are you getting this family to do all this planning all at one time? It would take us 20 years, if ever, of presenting these ideas to get them to implement all the strategies and techniques you have incorporated in their master plan. What have you done to these people? I have never seen them so excited—so motivated to action.”

The Answer

The answer to the question from the planned giving officer, and the attorney, and all the others is exactly the same. It is the process that we take our people through that motivates and empowers them to actually “pull the trigger” on these incredibly sophisticated and complex plans. It is the Family Wealth Counseling process that allows wealthy families to enjoy the exciting and life-changing results our plans produce.

For those of you who are able to see

beyond your own current paradigms, you should both implicitly and explicitly recognize that Family Wealth Counseling necessarily leads to plan implementation instead of the never-ending period of evaluation, hesitation and uncertainty that is common with traditional planning. Once our clients have completed this process, they understand how everything fits together into one big picture—a master life-plan—not just a tax plan, or an investment plan, or an insurance plan, or an inheritance plan, or a business continuation plan.

Through our counseling process our clients become absolutely clear in what they want. That enhanced clarity breeds greater confidence and that greater confidence empowers them to effectively take control of the entire planning process. Now, instead of being forced to depend on advisors to tell them what to do, they can tell their advisors what to do. With this enhanced clarity and greater confidence, they are able to discover substantially increased leverage for their time, their talents, and their treasures that will motivate and fulfill them for the rest of their days.

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