

Heritage Living Trust Sale Results In

\$32,000,000 -

\$53,000,000 Sale

April 26, 2012 ðAfter purchasing my own trust to get an understanding how the process worked I decided to mention it to my best client who was a business owner. For years he had tried to refer me to his three partners but they never seemed to "bite". When I mentioned the idea of a living trust to him, his eyes lit up. He asked if I would present it to him and the other partners. At the end they decided that their company would pay for trusts for all of them. Through the process of meeting and discussing the trusts I was able to get to know not only them, but also their wives.

Recently, these partners sold their business and they called me asking me what to do with the money. Over the course of a few weeks I invested over \$8 Million for them and will be investing \$24-\$45 Million more! RIDICULOUS, I know! Actually, it wasn't that hard because I had established a great professional relationship based on a trust!

A trust is part of a total financial strategy and it shows our clients that we care. The time you spend setting up the trust isn't wasted, it's an investment in the relationship. In conclusion, as planners we often don't know which seeds we plant will yield an abundant crop. Yet our responsibility is to keep planting seeds. Don't let little moments pass you by. Spend time with people, get to know them, do your best for them, and the best will come back to you. I am thankful that I was able to earn these clients trust, thankful to Heritage for helping me implement it, and thankful to God that we all have amazing opportunities laid in our paths if only we will take advantage of them.ð

AGENT LESSONS LEARNED

1. Buy a Heritage Living Trust for yourself to understand how the process works.
2. I hardly knew anything except the basics about trusts at the time, but I asked them if they were interested. What if I hadn't?
3. The trust sale, while time consuming because of the extensive nature of their estates, built trust and rapport and allowed our staff to give excellent customer service.
4. The trust was an easy, non-controversial product that my client could enthusiastically refer to his partners. Their other advisers weren't talking about it. I am thankful they were not.
5. A trust is part of a total financial strategy and it shows our clients that we care.
6. The time you spend setting up the trust isn't wasted, it's an investment in the relationship. Time to show your client the service you provide and the difference you can make.
7. As planners we often don't know which seeds we plant will yield an abundant crop. Yet our responsibility is to keep planting seeds. In order to get a client of this size it's ALL about the relationship.
8. Don't let little moments pass you by. Spend time with people, get to know them, do your best, and the best will come back to you.