

Life As An Estate Planning Clinic Intern, Part III

By Kelly Jex
July 7, 2015

Closing the deal is the topic of this week's article. It's that time in the Estate Planning Clinic that we are beginning to finalize and execute documents. So far, we have learned intake and interviewing, document drafting, follow up, and a lot of patience. Now, comes the time to put the pieces together and execute all our hard-written and researched work.

Lesson 1 - Maintain your patience. Finalizing documents can be get hectic. There is generally a time crunch. And, with multiple copies of documents floating around, it can also get confusing. Keep your cool with yourself and you will be able to stay organized and see the documents through. Keep your cool with your clients, and you will be able to finalize your documents on time.

Lesson 2 - Plan ahead. Preparation is the age-old key to success. Manage your time wisely, and you will be able to complete all your work in a timely fashion. Review all the material and all your execution documents ahead of time. Not only are you leaving your clients with finalized, legally-binding documents, but you are also leaving them with specific instructions for those documents and other paperwork. Make sure you walk into your final meeting having a plan for the meeting and knowing what is coming next. It will be the only way to ensure you don't forget anything!

Lesson 3 - Keep up your confidence. Even though you are embarking on a new stage in the Estate Planning Clinic, it is still very similar to what you have been doing all along. Document execution can be very complicated. There is a lot of paperwork, and a lot of steps. But, bear in mind, your client has no idea what that paperwork is and what those steps are. Even if you have to keep faking it until you make it, do not be afraid to lead your client and talk with confidence. The EPC provides all the paperwork you need to make your meeting a success.

In sum, document execution has been the most fulfilling part of my Estate Planning Clinic experience thus far. You get to see all your hard work come to life. And, there is great relief on your client's face when all is said and done - you have given them peace of mind. Rest assured you have done your job well - provided guidance, counseling, a listening ear, and a steady plan for the future.