

Art of Estate Planning Course

framework



PHASE 1:
Transform your mindset
and learn how to
harness the power of
estate planning
(2 hours)



PHASE 2:
Supercharge your
technical knowledge
with the estate
planning documents
crash course
(4 hours)



Phase 3:
Start implementing
your profitable estate
planning solution
(2 hours)

Phase 1: *Transform your mindset*



Shift your mindset
and learn the power
of estate planning

Module 1 – 30 mins



Learn how to have
positive, trust
building estate
planning
conversations

Module 1 – 30 mins



Be inspired and hear
our student success
stories

Module 1 – 1 hour

Phase 2: *Supercharge your technical knowledge*



Attorney Documents

Module 2: 1 hour



Wills

Module 2: 20 mins



Letter of Wishes

Module 2: 15 mins



Super and Life Insurance

Module 3: 45 mins



Testamentary Trusts

Module 4: 1 hour



**Joint Property &
Bank Accounts**

Module 3: 20 mins



Trusts and companies

Module 3: 20 mins

Phase 3: *Start Implementing*



**Design your Estate
Planning Service**

Module 5: 30 mins



**Choose your legal
partner and start
trailing them**

Module 5: 1 hour



**Start helping your
clients!**

Module 5: 30 mins