Get the practice you’ve always dreamed of. With LWP™, it’s easier than you think. We’ll show you.
WE ARE CATALYSTS FOR THRIVING LAW PRACTICES THAT MAKE A DIFFERENCE.

We work with lawyers who are frustrated with their practices because they are working long hours, lack direction, struggling with marketing or managing staff and making money. We guide them in declaring and committing to a path and plan they can believe in.

What makes Lawyers with Purpose™ unique is that we hold our members accountable to their plan and provide a believable infrastructure for them to not only achieve it, but maintain it. Consistently over and over again.

Our members tell us they are accomplishing their goals, making more money, and can finally delegate, trust their team to lead, and feel confident it won’t break the moment they give themselves permission to take a vacation.

“We believe that [working with] LWP™ has visibly increased our bottom line, while at the same time publicly repackaging our practice as the community experts in estate planning.”

ROSS D.

WHAT DEFINES YOUR PURPOSE?

What’s the plan and path you want to commit to? You don’t have to give up your purpose to have profitability. You can thrive and do what you love and have purpose.

“LWP has given us direction and focus from our big picture goals right down to the daily schedule for each attorney and provides a tool and metric for each task. Everything is tracked and all employees are held accountable with the use of the focusers. At the office anyone can pick up a focuser and know where we are at and what needs to happen next with each client. This system is great. Did I mention we have about half the stress we did from a year ago?”

JEFFREY B.
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Our Philosophy

Our foundation began in 2001 and has evolved into what is now Lawyers with Purpose™. Over the years, our philosophy and mission have always remained the same: we are a company that utilizes our talents, systems, technology, and coaching to inspire lawyers to have thriving client-centered practices that help the people in their community protect what’s important to them.

At Lawyers with Purpose, we put you first so you can put your clients first. Each member of the LWP™ team brings a certain area of expertise which supersedes other national attorney organizations. Our co-founders practice what we preach every day, and we understand and relate to every LWP member. When the industry is changing we feel that shift, but we are proactive in finding solutions to pass along to you.

As attorneys, we are passionate about helping people, and at LWP we are passionate about helping you become successful, whatever that means for your individual practice. This is why we do what we do. We want you to feel what it means to be a lawyer with purpose. We want you to establish the same organizational values.

- **Learning** – We learn together. Our systems and processes provide the know-how to guide your practice. We provide you with the most up-to-date information on the ever changing law.

- **Possibility** – We want you to see the numerous possibilities to grow and enhance your practice. With LWP’s marketing tools, the possibilities for your practice to succeed are endless.

- **Cultivating** – We help you earn the respect you deserve and become the market leader by cultivating your knowledge of the law, your ability to market yourself, your company tracking and reporting capabilities, and your execution of the systems and processes.

- **Community** – You must feel like part of your community and your community must feel like you are a part of them. Care about the people in your community and they will care about you!

You know you are operating as a lawyer with purpose, when not a month will go by without a client bringing goodies to you and your staff. Discover and learn your organizational values, and you will in turn establish our philosophy.
WHAT DRIVES A LAWYERS WITH PURPOSE™ PRACTICE?

Creating communities where people can protect what’s important to them and where client-centered lawyers can be valued for the peace of mind they help provide.

- Education
- Tracking
- Drafting Software
- Marketing
- Systems & Process
- THE LAW
- Coaching, Consulting & Implementation
- LWP
Welcome

We at Lawyers with Purpose™ know and support the difference between running a law practice and running your law firm as a successful business. Some learn the hard way, by trial and error.

What would happen if you had a family emergency and needed to be away from your practice for weeks, or a month? Would the brakes be locked up? Would your practice be paralyzed? Do you have another attorney to consult with to back you up? Would your production stop? Would cash flow become inconsistent? Most attorneys struggle to find the time to market, which in turn affects cash flow six months down the road. It’s a vicious cycle most lawyers don’t know how to get out of. If you can relate, then this is a sign that something has to change.

At Lawyers with Purpose, we created systems and processes for your practice to operate without you. We’re pretty sure you love what you do. We want you to be able to not only work with people you like, but truly help people. We have developed a program that teaches attorneys and financial advisors the legal-technical side of estate planning, how to strategically market a firm for desired results, and how to implement the tools, processes and systems that will enable staff to efficiently run a successful practice.

Today, with successful members all over the nation, our program has measurable proof. Working fewer hours and making more money isn’t such a bad trade-off for a professional training program!

We show you how to successfully avoid the pinch to your cash flow. We continue to be a leader in teaching innovative strategies, marketing, and firm processes that are needed to work easier and play harder.

We invite you to consider LWP™. Join the hundreds of national LWP member law firms who are able to work less and earn more. Stop sending out referrals that could drive your practice revenues into the top 5%. You can enjoy the practice of law without compromising your personal and family time. And best of all, you can truly enjoy helping those clients who need you most.

“Lots of information that is useful in everyday practice and we can immediately take back and implement. LWP is the key to your success.”

MELISSA W.
OUR LEADERS

DAVID J. ZUMPANO  
Co-Founder & Chief Innovator

In 2001, I founded this organization by default. It happened by talking in the hallways and at national events with other lawyers and sharing ideas I was using that were working well. Since then I am proud to say that everything now is, by design, very intentional and focused.

The strength of this organization is founded on practicing attorneys who are doing the same thing that you are. My skill has been to utilize my gifts by identifying current market trends and building new innovative solutions to help my practice grow and sharing those with our members. My commitment as a practicing attorney and a co-founder of this organization is to ensure that you’re constantly provided new innovative solutions in real time as it occurs.

VICTORIA L. COLLIER  
Co-Founder & VA Expert

Assisting Veterans is a personal passion of mine. It is my commitment to ensure members of LWP have the education, resources, and support necessary to competently and confidently create asset protection plans for Veterans. I began teaching other lawyers about the VA Improved Pension program in 2006. Through LWP, we have created a systematic way, through processes and revolutionary software, to cost effectively assist wartime veterans obtain the benefits they have earned.

MOLLY L. HALL  
Co-Founder & Director of Team Development

Over the past 17 years I have been dedicated to consulting and coaching 500+ Estate Planning attorneys and the teams that support them. My unwavering commitment in creating, training, and supporting intrapreneurs in an entrepreneur’s world is evident as a co-author of the #1 Amazon Best Seller; Don’t Be a Yes Chick: How to Stop Babysitting Your Boss, Transform Your Job and Work with a Dream Team Without Losing Your Sanity or Your Spirit in the Process. My unique ability is providing committed, clarifying leadership in a safe, trusting, authentic relationships so attorney and team alike will be courageous in the face of fear, discover their capabilities, create value, meet their challenges to live a life of connection and community, and achieve their goals and desires.
WHO IS THIS NOT FOR?

THE NON-COMMITTED

It requires a commitment and it requires time. The good news is that time is going by anyway. The difference is what you’re doing differently during that time to get a different result.

THE QUICK FIX.

This is not a program for you just because your revenue is down this month. This is a practice transforming solution to have your revenue up in perpetuity... consistently

YOU HAVE TO KNOW WHAT YOU WANT.

If you do not know what you want, then this program is not for you. Being really clear as to what you want in life is essential to succeed in any business just as it is here at Lawyers with Purpose.

CAN I DO IT IF I’M ALONE?

Yes, you can do it if you’re a sole practitioner, but it requires discipline. You have to be committed to taking the necessary steps so that wherever you are now, you can grow into your vision for something better.

YOU NEED TO TRUST PEOPLE.

If you are a person that can’t trust people and need to do it all yourself then this is not for you. You really need to create good relationships that you can rely on and enjoy.
WHAT MAKES US DIFFERENT?

INTEGRATION

Lawyers with Purpose™ is different because we use integration. LWP™ combines everything under one umbrella and allows you to see the big picture as a unified whole. LWP enhances what you already know to achieve the best results which give you derivatives and velocity.

LWP measures what you know and based on our integrated system, we generate a whole lot more information with accountability and reporting. Instead of throwing ideas out there and not knowing which will work, LWP understands the underlying assets from your ideas and can inform you how fast and in what direction they will take you. Reporting in real time is effective and accurate.

ONE STOP SHOP

Utilize one legal based tool to educate referral sources, clients, lawyers, and other professionals.

• Gives you meaningful reports that take the information you already possess and report it in a way in which you can benefit from it in real time.
• Helps you take your legal-technical training and turn it into marketing.
• Helps you take your marketing and turn it into legal-technical.
• Feels your pain when you do because we are also practicing attorneys, and when the industry changes, we are innovating solutions accordingly.

As a Lawyer with Purpose, you will feel content and happy as you are helping people with consistent cash flow which removes their anxiety. You’re doing more with less.

“It’s a family or community type atmosphere. We are all here to help each other survive, grow and achieve our goals.”

AMANDA B.
Tried, Tested, Proven.

LIVE LABS PROVE IT WORKS

- We conduct hands-on lab work so when our members leave each training, they know the next steps to execute with precision; no guesswork. This approach allows our members to easily accomplish results in the shortest amount of time possible.

- We furnish thorough detailed step-by-step legal software systems to assist our members in helping their clients with needs in Asset Protection, Estate Planning, Elder Law, Special Needs, Estate Tax Plans, including Veterans Administration Pension Benefits Qualification, Medicaid Qualification, and Probate & Trust Administration.

- We publish information on how we run and operate our law practice in various formats, including forms, templates, software, and videos to support you in every aspect of your business.

- We provide training, implementation, and coaching to help our members and their teams reinforce our methods and strategies, and work through obstacles in their practice so they enjoy success and balance.

- We facilitate an active community you can access 24/7, so our members can get answers to any questions they might have no matter what concern is keeping them up at night. As a member, you will have access to a high caliber and energized community of attorneys who are ready to help and share solutions.

We feel your pain when you do!
When the industry changes,
we are innovating solutions!
How do you get there?

LWP™ Law Practice Model

A complete integration of systems, technology, marketing, team building, and coaching to create measurable results for you, your family, your practice, and your community.
PRACTICE EFFICIENCY

Can your practice operate without you? Can you take a vacation and not lose revenue? Do your employees work as a team and are you able to train new employees quickly? Do you have consistent cash flow?

WHAT LWP™ GIVES...

• The Revenue Focuser™ to get back into determining your firm’s bottom line.
• A thorough law firm efficiency audit of your individual firm.
• A complete Client Enrollment Tracking System.
• A complete overview of what is needed, what works and what will help you manage your individual firm’s staff organization, organizational strategy, calendars, and agendas.
• E-Myth™, an introduction to the entrepreneurial myth that most people who start small businesses are entrepreneurs.
• Help you learn how to work on your business rather than in your business.
• Coaching of the natural strengths of each person on your team, the key to successful relationships, parenting, and career development.
• Conflict resolution skills, communication skills and relationship skills for creating Power-in-Partnership™ with your referral sources.

WHAT YOU TAKE AWAY...

• The ability for your and your team to immediately implement the LWP Process.
• A law firm efficiency audit that will allow you to return to your office and immediately see a return on your investment.
• A comprehensive team compensation plan to retain your strong employees.
• Relationship skills for success and an understanding for resolving conflict with better results.
• Training DVDs, outlines, checklists, and tools for every meeting in the LWP Referral and Client Enrollment Process™.
**TEACH, SHOW, DO, & GO:**

LWP has a laboratory within their own founder’s law practice. The system has been proven. By using the LWP teaching strategies, the founding practice was taken to an entirely different level. LWP will **TEACH** the legal-technical competence to avoid malpractice. LWP will **SHOW** you new, innovative and proven strategies, tools, and leadership. LWP will have you **DO** real case studies, activities and practices using the LWP tools & strategies. LWP will provide what you need to **GO** implement your new Profit Center.
The Lawyers with Purpose™ Coaching, Consulting & Implementation (CCI) program is unparalleled in the Estate Planning & Elder Law Industry. It just doesn't exist—anywhere. CCI is an action oriented service that guides LWP law firms in setting realistic goals for success while providing a tried, tested, and proven path and plan for attaining those goals. It all centers on a comprehensive, ongoing one-on-one Implementation program customized to your practice to implement the LWP systems that will get you the greatest impact fast.

The LWP CCI team has a combined 45+ years of expert industry specific experience that qualifies the implementation team to lead members through their own personalized explorative journey to ultimate fulfillment.

The CCI team serves as a constant pillar of support for our members. We bring to the table a steadfast desire to support attorneys in their growth, a willingness to work with you vs. providing more binders that are going to sit on the shelf, and a dedication to supporting you to succeed through monthly coaching, consulting and implementation calls for you and your team. To give you an example, a few of the themes of the calls will be:

- Building Your Foundation
- The LWP Process
- Time and Money
- The Client Enrollment Process
- The 5 Key Focusers to practicing efficiently & effectively
- The Client-Centered Estate Planning Process
- The Relationship Management System
- Adding to the Business
- Getting in the Door with Nursing Homes

To name just a few. As you can see, this implementation program is not something just thrown together—this is a serious, practical, and meticulously engineered program designed from the get-go to help you achieve maximum results and maximum success... whatever that means for YOU!
ATTORNEY LED MENTORING

What makes the LWP™ Attorney-to-Attorney Led Mentoring unique is our skilled, successful LWP member attorneys know, firsthand, exactly where to hold the member accountable to their plan and how to provide an infrastructure for them to achieve it. Our members tell us they are accomplishing their goals, making more money, and finally can delegate, trust their team to lead, and feel confident it won’t ever, ever break.

The LWP attorney mentoring seeks to elevate the competence, professionalism, and success of member attorneys through a powerful specific guidance system that led by estate and elder law attorneys that started out where you are today, face the exact same challenges of growing and building a practice.

The LWP attorney mentor coaches have each studied personally under the greatest master in building a successful Estate and Elder Law business, David J. Zumpano, Co-Founder of Lawyers with Purpose™. They also are certified in the nationally recognized Ridge Associates, Train the Trainers™ program.

UNPARALLELED IN THE ESTATE PLANNING & ELDER LAW INDUSTRY.

When you join LWP you are not just buying software, systems and legal/technical training. Rather, you are opening the door to a world of opportunity – and the support that ensures your success! The Attorney mentors make a firm commitment to support you, but you are always in the driver’s seat. You determine the pace at which you proceed and how quickly you will achieve your goals. Consider this like going back to school. But this time it’s just not law – it’s like a graduate course in law practice design, development and maintenance.

The LWP attorney lead mentoring is unparalleled in the Estate Planning & Elder Law Industry. It just doesn’t exist–anywhere. The mentoring is an action oriented service that guides LWP law firms in setting realistic goals for success while providing a tried, tested, and proven path and plan for attaining those goals. It all centers on a comprehensive program customized to your practice that will get you the greatest impact, consider it a personalized explorative journey to your ultimate fulfillment.

Our attorney mentors serve as a constant pillar of support for our members. We bring to the table a steadfast desire to support attorneys in their growth, willingness to work with you and a dedication to supporting you to succeed through coaching, consulting and accountability to achieve your personal and professional goals.
BUSINESS 101
Defining Job Descriptions, Roles & Expectations
The Revenue Focuser
Learn the LWP Client Centered Software

BEST PRACTICES APPROACH
Team Building and Effective Communication
Implementation of Time Templates
Tracking & Reporting to Make Sure You Get & See Results
Weekly Team Huddle Implementation - Making sure it all clicks

MARKETING & RELATIONSHIP MANAGEMENT
Marketing Plan & Marketing Budget
Private & Community Presentations
Client Enrollment Process
Community Outreach
Public Relations
Retail/Wholesale

LEGAL-TECHNICAL
Asset Protection
Medicaid
Veteran Benefits
Special Needs Trusts
Weekly Live ListServ
Live Support

MAKE IT WORK
Tracking & Accountability
Coaching, Consulting & Implementation (CCI)
Law Firm Audit
Adding to the Bus - Who and When

MAINTENANCE
Monthly Member Webinars
Monthly Marketing Roundtable
Good to Great Training
Supporting Your Firm Growth
ACTIONSTEP YOUR PRACTICE INTO THE FUTURE

WHAT’S INCLUDED IN LWP™ ACTIONSTEP?

WORKFLOW PROCESSES
Workflow stops you from messing up and shows you exactly where you are in the Process. Actionstep brings the visionary LWP process to life by embedding it in the very fabric of your practice management system. Simply step your way through:

• Relationship Management System (RMS)
• Client Enrollment System
• Estate Planning & Elder Law System
• Probate & Trust Administration System

• Annual Client Maintenance System
• Medicaid
• VA

REAL-TIME REPORTING & TRACKING
These can be either viewed on screen or exported to excel for reporting.
These include:

• Initial Contact Focuser
• Workshop Focuser
• Workshop Results Focuser
• Pipeline Focuser
• Pipeline Results Focuser
• Cash-flow Focuser

• Cash-flow Results Focuser
• Signing Meeting Focuser
• My Key Focuser
• My 10 Focuser
• Referral Focuser

LWP CLIENT CENTERED SOFTWARE
ActionStep includes all LWP Software, offering members and your clients total access to our innovative legal analysis tools and document production system related to Asset Protection & Medicaid Planning, Trust & Estate Planning and Life Care Planning. By preparing documents through the ActionStep system, members are able to produce and maintain client documents within the ActionStep client file, eliminating duplication in firm workflow.

FINANCE AND ACCOUNTING
Actionstep includes a full accounting system integrated with the LWP systems and reporting. Members are encouraged to migrate to Actionstep accounting to take advantage of these features and to prevent double data entry. The system includes a complete trust accounting system that can be accessed from within the matters.

WHAT ABOUT ON-GOING SUPPORT?
To submit questions or requests for assistance with ActionStep, please use the following link:
softwaresupport.lawyerswithpurpose.com

We have weekly “how-to” support webinars held each Wednesday from 2:00-3:00 PM EST to help you as you begin implementing ActionStep into your practice. Stay tuned to the ListServ for the topics and registration links. The webinars will be recorded and available to all members.
MARKETING

Many attorneys are averse to marketing and worse, they don’t do it until they have to. Marketing is not a particular action, but rather a way in which you operate your law firm. It is not based on a single act, but based on a strategic accumulation of simple acts that together create the results you ultimately want, while maintaining your integrity and belief systems.

At Lawyers with Purpose™, we approach marketing based on a three-prong strategy: the retail approach, the wholesale approach, and the branding approach. The reality is you’re doing it anyway, but you’re just not doing it in a way in which others can respond naturally and willingly...ultimately engaging you.

RETAIL MARKETING

Retail marketing is the strategy where you market directly to your target market. This is traditionally done by newspaper ads, telephone book, radio ads, and maybe even TV. This strategy is utilized to get the client to come directly into your office or to an educational presentation (or we’ll call it a workshop). Retail marketing has the quickest turnaround time from marketing to client, but it is the most expensive. While expensive, it still is very effective when done properly. The keys to have it done properly is to ensure once they come into your office, that you have the strategic plan to help the client see the value you can provide for them, so that they will engage with you willingly. Not only does LWP provide you the retail marketing strategy but we also provide you the educational training and tools to carry it out in a manner that allows prospects to identify your value easily. We also have multiple, fully developed workshops that are wholly inclusive with the speaker’s notes, course plan, handouts, overheads, and all the other elements you need for a successful educational presentation. Most importantly, we also teach you the fundamental standards to deliver a workshop where the client can identify your purpose and the value you can provide for them, in terms they understand and believe in. If most clients can identify with you in the workshop, and are confident you can solve their problems...they will hire you.

WHOLESALE MARKETING

While retail marketing is more of a bucket approach, that is, to go out and sell the bucket, empty it, and then go out and refill the bucket, wholesale marketing is more of a pipeline approach. Wholesale marketing is creating meaningful relationships with allied professionals who service your target markets. A critical element of wholesale marketing is creating relationships with people who respect what you do and enjoy working with you. It also involves trusting your clients. I know it may sound foreign, but when properly done, your relationships can be actually enjoyable for you as well and not the subject of angst. How many times have you had a meeting with a potential referral source, felt like
you hit it off, but then nothing ever happened. It’s not because they didn’t like you, it’s just because there was no clear path for them to work with you or the value that you provide to them to build their practice wasn’t clear to them. At Lawyers with Purpose™, we have the complete relationship management system that focuses on an initial meeting. In one hour, it helps you identify the great relationships from the not so great ones and more importantly helps you identify relationships you can actually enjoy and develop a mutual respect for and work with to support each other’s clients. This relationship management system not only makes your relationships more enjoyable but also helps you quickly identify and manage where to effectively spend your time. In fact, we have proven over and over again with our members that the two 1½ hour meetings a week are more than sufficient to create a pipeline of referrals to support your monthly revenue goals and objectives and bring joy into the practice you have. At LWP we also have multiple presentations, CE, and CLE approvable presentations to deliver to the professional relationships you build.

BRANDING

Unlike retail marketing and wholesale marketing, branding is what you do when nobody’s looking, but inadvertently they always are. Branding is what you do when you talk at social functions to other people. It’s what you do when you go to your local church or synagogue. It’s what you do when you go out with family members and friends. Branding is also what you do in all of your retail and wholesale marketing strategies. Ultimately, branding helps people in the community identify what they think when they hear your law firm name. The key toward a branding strategy is to be yourself, but also, to integrate who you are across all three elements: retail, wholesale, and branding to utilize a variety of methods, including print, writing, educational presentations, speaking opportunities, relationships, brochures, guides, and other methods to help people understand who you are and what you do. A properly designed three-tiered marketing system will get you regular referrals on an ongoing basis (weekly) from a variety of sources. Typically, our members are getting referral sources each week from retail, wholesale, and branding efforts. A constant pipeline of opportunities shows value as a practice and allows them to share their purpose with the clients they serve.
CLIENT ENROLLMENT SYSTEM

A good marketing system to generate a new prospect to call your office is invaluable, but all too often we see all the hard work of good marketing destroyed by the lack of a proper client enrollment system. What is client enrollment? It is simply helping the client to identify how you can support them so they would be willing to engage you to help solve their problem. Sales is one attempt to get someone else to hire you. Enrollment, on the other hand, is all about identifying the need of the client and then eloquently being able to show how their need can be solved by you easily and efficiently. An effective client enrollment system begins with the initial call into your firm. You must be prepared on how to handle that call and how to route them.

CLIENT ENROLLMENT SYSTEM (CES™)

The LWP™ model only allows two options, enrollment into a client workshop to learn about all the things they don’t even know they don’t know, or an initial meeting for those who have a more urgent situation and just need a solution to a single problem. Once the client is enrolled in attending an initial meeting or vision meeting, then it becomes the attorney’s job to listen. Steven Covey’s book, “The Seven Habits of Hiring Effective People,” starts with a simple command in chapter one “Seek first to understand.” That is the goal of client enrollment. First and foremost it is to understand the client’s needs, then providing just enough education (so as not to overwhelm them) so they can see you have proposed solutions.

Most attorneys fail in enrollment in that they puke all over the client. What does that mean? They start to teach the client how they do what they do and how a trust works. Imagine going to your auto mechanic and having him start to explain to you how the spark plug wires work. The reality is that you just want the car to run when you turn the key over. The same is true for clients. They just want a solution. They really don’t care how it works. They just want to know how it will support them.

One of the most critical elements of enrollment is being able to show the client how you can accomplish their goals and objectives without overwhelming them with information. At LWP we use a simple three-step process to enroll them based on trained communication skills, and an integration with what they have learned at the workshop. Utilization of our estate plan audit and vision clarifier has increased the hiring rate for most of our new members by two or three times. Isn’t it time you increased your success in getting clients to hire you?
LEGAL TECHNICAL

WE ARE NOT JUST LAWYERS, WE ARE PROBLEM SOLVERS.

What truly makes us different from any other legal organization in the industry is our legal-technical training. If you think of the continuing legal education (CLE) we traditionally attend, someone speaks at you, you listen, you get excited about what you learn, and when you return to your office, you go back to what you were always doing and fail to implement little, if any, of what you learned.

What makes our legal-technical training different is the methodology on which it was built. Our founder created the trainings based on working with a world-renowned communication and training expert. In working side by side with this expert for over three years, LWP identified the core elements of everything we do as lawyers and converted those key elements to tools for lawyers to use to be able to consistently and competently provide solutions to the needs of their clients.

With LWP, our legal-technical training is done on the teach, show, do, go trademark model. We teach you the law, we show you how it is applied, we show you a tool that utilizes the application of the law to your individual discretionary application, and then you physically do real life case studies in the training, so you can be confident of the application of the tool to accomplish your individual goals for each client. The final step, is the “go”, meaning, you leave the training with the tools necessary, and you are confident to be able to consistently and competently provide legal solutions to your clients.

WHAT WE TEACH

Our legal-technical training includes the training and tools necessary to understand and properly design wills, healthcare proxies, powers of attorney, personal care plans, revocable living trusts, and irrevocable trusts for asset protection, business protection, estate tax planning, veterans’ benefit eligibility, Medicaid eligibility, and special needs planning.

A powerful element of our legal-technical is that we are one organization that trains all areas of law to serve the 99.7 percent of Americans. What don’t we teach? How to do graphs in advance, FLPs and advance planning techniques, and advanced gift discounting techniques for the super wealthy (the .3 percent).

“LWP is the definition of a win-win situation: don’t wait, make the change that will transform your practice”

CONNIE A.
LWP™ VALUE BASED ESTATE PLANNING PROCESS

WE ARE ONE ORGANIZATION THAT TRAINS ALL AREAS OF LAW TO SERVE THE 99.8% OF AMERICANS. ARE YOU CHASING AFTER THE .2%?

OTHER PROCESSES: MEDICAID AND/OR VA QUALIFICATION, PROBATE & TRUST ADMINISTRATION, BUSINESS PLANNING, ETC.
MEDICAID

WE PUT MEDICAID PLANNING ON THE MAP.

Our Medicaid qualification worksheet is not only the finest, but by far the most advanced in the industry and our Medicaid qualification software is the only software in the entire industry that helps you properly calculate Medicaid eligibility for any type of client. Not only does it help you identify the maximum amount of assets that can be protected in the shortest period of time, it helps you present it to the client in a methodology they can understand and you can be confident you can achieve.

By use of the Medicaid qualification software, you are able to provide not only clients, but also your referral sources, detailed opinion letters on the asset protection and Medicaid planning strategies you can utilize to get each client qualified in the soonest possible time, protecting the maximum amount of assets based on an individual fact pattern. More importantly, it also calculates the asset risk analysis and the funding road map to ensure the funding is done in a timely and effective manner.

Most recent editions include an IRA liquidation analysis and annuity versus trust planning analysis. An IRA liquidation analysis, which actually calculates the point in time in which it would have been more advantageous to liquidate the IRA and pay the tax, rather than annuitizing and taking the RMD. Another recent edition includes the annuity versus trust planning analysis which helps identify the exact amount of money needed to go into an annuity, and when it would be more effective for the client for a trust plan to be utilized. There is no other software in the industry or even training that provides this information and knowledge. And at LWP, it’s at your fingertips any time you’d like it, in real time.

One of our co-founders, Dave Zumpano, has been providing this Medicaid expertise to the national industry since 2001 and has introduced it to at least three different national estate planning legal organizations including the National Network of Estate Planning Attorneys, Wealth Counsel, and the American Academy of Estate Planning Attorneys. Dave’s expertise in bringing this knowledge into tools and systems to help you to be confident knowing you are not missing anything and getting the best possible result in your practice is unparalleled in the industry.

“I would highly recommend the program to anyone looking for ways to expand their capacity to meet the needs in their communities.”

SCOTT M.
Would you like to feel good about what you do and still be profitable? It is incredibly satisfying to sit in the same room as a Veteran who served bravely to defend our rights, who now needs an advocate to defend his rights. These rights are to live independently, to age with dignity, and to gain access to quality health care without going broke.

Veterans Benefits Planning for Wartime Veterans has been a new concept for Estate and Elder Care Planning lawyers since 2008. Most Veterans are unaware that benefits are available. Innovative lawyers quickly see how incorporating VA Benefits Planning into an estate planning and elder care law firm easily compliments the services already being provided.

**VA BENEFITS TECHNOLOGY LEADS THE WAY.**

Lawyers with Purpose™ provides members with state-of-the-art VA Benefits Qualification technology that puts your firm at an advantage. It streamlines the planning process and enhances efficiency and productivity within the firm. Laws are changing that affect our wartime veterans. LWP’s Co-Founder, Victoria Collier, CELA, has taught lawyers across the nation and continues to stay on the front lines, bringing our members the latest news. Moreover, LWP members have access to the only user friendly software that compiles the necessary VA application documents in less than 15 minutes in a “ready-to-file” format.

With LWP, you will be part of a community that supports your growth in a new practice area that is virtually untouched by the legal profession. Veterans have helped us to have better lives. Now we can give back by protecting what is important to them and obtaining additional benefits.

**RIGHTS TO LIVE INDEPENDENTLY, TO AGE WITH DIGNITY, AND TO GAIN ACCESS TO QUALITY HEALTH CARE WITHOUT GOING BROKE.**
SPECIAL NEEDS PLANNING

Our special needs training has been hailed as simplified. A typical response from attendees is ‘Wow, I finally understand this and feel like I can really do it.’ The reason is our unique strategies that teach the ten core causes of special needs and the mistakes most people make when attempting to plan around them. Most importantly, we provide you a streamlined approach to effectively identify those needs and how best to approach them in the design of your first or third-party special needs trust.

Do you know someone who is challenged by a disabling condition? With an estimated 57 million people in the U.S. civilian non-institutionalized population reporting a disability in the 2010 census, it is not an understatement to conclude that everyone knows someone with a disability. Whether it is a physical, mental, or developmental disability that is no one’s fault (such as Down Syndrome or autism), or one that is caused by the actions or inactions of third parties (such as in a personal injury scenario), the disabilities community is rapidly expanding.

Providing appropriately for the “special needs” of persons with disabilities has emerged as a challenging and complex multi-disciplinary task over the past 20 years. If you know “just enough to be dangerous” about how best to address the myriad needs of families trying to secure the future of their loved ones with disabilities, Lawyers with Purpose can serve as a valuable resource.

Nationally recognized Special Needs Planning experts regularly post blogs covering a broad range of topics relevant to attorneys and allied professionals who serve those with disabilities. These experts also respond promptly to LWP member list-serve inquiries, and present periodic webinars and in-person presentations on emerging issues of concern to those who practice in this fast changing area of the law.

Special Needs Planning is virtually recession-proof, as families of all socioeconomic strata engage in this critical planning regardless of their estate tax brackets. Although most traditional estate planning attorneys are ill-equipped to advise clients in this complex arena, LWP members can expect top-notch expert guidance and collaboration that will jump-start, or accelerate, a new or established practice in this rewarding specialty.

“It is very enriching to your practice and valuable and can put you way above other practices if you follow the damn system.”

ARDIE S.
Asset Protection for the 99.8%

Do you remember the burst of the tech bubble in 2001? Do you remember the great recession that began in 2008?

Well, we can tell you clients remember, and as a result, they have totally changed their focus on what estate planning means to them. For the vast majority of the clients LWP members serve, a client’s number one concern is no longer whether they avoid probate or not, but whether their lifetime of assets will be taken away from them by needing long-term care, being sued, or most importantly, being taken from them by the government. That’s where Lawyers with Purpose shines. LWP is the innovator of asset protection for the 99.8%—that is the percentage of Americans who don’t need estate tax planning but still want to protect their assets.

In 2001, when the federal estate tax rates changed, it created a whole new planning opportunity which LWP started and has flourished and excelled in, even to this day. So many practitioners confuse the asset protection requirements with the tax reduction. This confusion is detrimental to their success. When analyzed, the restrictions required of our clients on asset protection planning is far less than that for estate tax planning. So we are able to provide clients asset protection trusts they can control, can benefit from, and can change. While it sounds too good to be true, it does have its restrictions, namely that they must give up access to that which they want to protect, but the way we do that allows clients still to maintain control and have full use of their assets, without having access, all while following common law, trust law, uniform trust code, and the Restatement Second of Trust, and many other well established legal treatises. In fact, our co-founder, Dave Zumpano authored a revolutionary law review article published in 2010 setting out how the estate planning landscape has changed by the utilization of Irrevocable Pure Grantor Trusts (IPUG®). But IPUG® is much more than just a trust, it’s an integrated system of a variety of different trusts utilized for clients to accomplish a variety of goals they may have. They include the income only version MIT™ (my income trust), FIT® (family irrevocable trust) and KIT® (kids irrevocable trust) and more recently, the LWP system has added CGT (completed gift trust) and TAP (tax all purpose trust). These trusts are specifically used for Medicaid and VA Benefits Planning and to have completed gifts for purposes of income and estate tax planning.

Asset protection means something totally different to clients than it does to lawyers. It’s absolutely essential that we, as Lawyers with Purpose, understand what our clients desire and help and support them in accomplishing the goals and objectives of protecting their assets, while being able to maintain control and security for the rest of their lives. The greatest significance is properly drawn IPUG® protection trusts as they can be utilized for asset protection for business owners, and/or, they are fully Medicaid compliant. Isn’t it time you adopted the new landscape for estate planning and provided this revolutionary form of asset protection?
Unlike domestic asset protection trusts (DAPT), which are complicated and limited to a handful of states, IPUG® protection trusts can be utilized anywhere and are based on sound, fundamental, long-standing, common law, trust law, asset protection law, and fully consistent with what is outlined in the Uniform Trust Code, Restatement Second of Trust, Restatement Third, and other well established legal treatises.
CLIENT-CENTERED SOFTWARE

One of the most unique and powerful elements of the entire Lawyers with Purpose™ Law Practice Model is our industry document creation software. What makes it industry busting? It’s a whole new dimension to provide competent legal documents. But what makes it unique is that it’s not just software, it’s a culmination of the estate planning experience for the client. The name says it all, Lawyers with Purpose, client-centered software. It is unparalleled in the industry, because unlike typical legal software, this software is based wholly on the needs of the client. In fact, the needs of the client are clearly identified in the initial meeting when they hire you. The process we use to help them identify the plan solves the need the client has expressed. It starts all the way back at the workshop where we educate them. It then carries into the initial meeting where they hire us and then into the design meeting where a detailed design template is utilized. This helps to walk the client through their life, while they are alive and well, when they become disabled, when they die, when their spouse becomes disabled or dies, and even when their assets pass to their children and what happens if they become divorced, die, disabled, or have creditors or predators pursue them.

The other industry busting element of this software is that it is a single entry system. This means that a single interview based on the design will generate all documents (wills, healthcare proxies, powers of attorney, revocable trusts, and irrevocable trusts) all based on a single entry. More importantly, as you go through the interview, the software will warn you if you pick choices throughout it that are inconsistent or could lead to potential malpractice. You are protected at every angle and that’s not all.

In addition to these protections and industry busting standards, it is also the most customizable software in the industry. It permits dozens of sub-trusts, trustee appointment for each sub trust, different distribution standards for classes of trusts, stand-alone sub trust and even has an element of artificial intelligence to create results that you as the attorney, once trained, are absolutely confident not only in what you are doing, but anyone in your office that is supporting you in this role will be doing competently and confidently.

Another unique offering of the software is its comprehensiveness. Not only does it provide wills, healthcare proxies, and powers of attorney, but it’s our industry exclusive personal needs plan, IPug™ trust, completed gift trust, and Medicaid qualification software. Come see the next generation of document creation.
It’s not just software, it’s a culmination of the estate planning experience for the client.
PRACTICE WITH PURPOSE PROGRAM

WORK LESS, EARN MORE. ALL THIS IN JUST 3 DAYS.

DAY 1 | MEDICAID FOR CRISIS & PRE-PLANNING

WHAT LWP GIVES, WHAT YOU TAKE AWAY:
• Business Rationale “What’s In It For Me?”
• Medicaid Crisis & Pre-Planning
• Asset Protection Planning
• Learn the Rules, Exceptions, Strategies and Secrets
• Counseling and Design Issues
• Real-life Experience in a Classroom
• Medicaid Qualification Worksheet™
• Spend-Down Methods & Calculations
• Tools to Reveal Your Clients’ Real Needs
• Value Proposition Conversation & Asset Risk Analysis™
• Funding Table & Roadmap™
• Checklists for Proper Planning
• The LWP Business Model
• Real Case Studies

DAY 2 | ESTATE PLANNING CLIENT-CENTERED PROCESS™

WHAT LWP GIVES, WHAT YOU TAKE AWAY:
• Identify communication pitfalls and learn to avoid them
• Learn to communicate more effectively with clients, referral sources and co-workers
• Develop and maintain relationships with other professionals through a systemized approach
• Master client attraction through education
• Master client retention skills with step-by-step meeting systems
• Master skills by demonstration and hands-on activities to hone the skills as you learn
• Learning the LWP MIFy Communication Skills
• RMS and Client Enrollment Process
DAY 3 | TRUST DESIGN

WHAT LWP GIVES, WHAT YOU TAKE AWAY:

- Review the fundamentals of trusts
- Discover iPug™
- Learn the Purpose and Use of Special Needs Trusts, Tax All-Purpose Trusts and Completed Gift Trusts
- Develop skills in drafting specialized client-centered documents
- Work with the trust-design tool that will allow you to delegate drafting responsibilities

“YOU DON’T KNOW WHAT YOU DON’T KNOW. COME LEARN HOW TO BEST SERVE YOUR CLIENTS”

MATT D.

IF YOU WANT TO GO FAST
GO ALONE

IF YOU WANT TO GO FAR
GO TOGETHER.
TRI-ANNUAL PRACTICE ENHANCEMENT RETREATS

At LWP™, the learning never stops. LWP shares their new innovations in legal technical, marketing and practice efficiency to keep you current on the changing laws, so you can maintain your confidence and success. The Tri-Annual Practice Enhancement Retreat will propel your practice!

LWP members are invited, along with their team members, to this 2 1/2-day event. Attorneys will learn about the systems and processes, as well as the marketing and referral relationship system, alongside other members and their staff from across the nation to learn how to implement the estate planning process for practice efficiency and effectiveness.

HANDS-ON TRAINING:

• Advanced marketing strategies, including the LWP Referral Management System™, that will drive referrals to your practice.
• How to develop a practice that operates consistently with your marketing message.
• Successful cash flow and firm growth.
• New practice efficiency and marketing strategies and tools.
• Connect with other LWP members. Meet members from around the nation! Connect with those that have shared the LWP experience and see how they continue to grow their law practice.

YOUR FIRM WILL LEAVE WITH...

• The ability to distinguish between financial advisors and consultants.
• An analysis on the number of lawyer and staff hours required to meet revenue goals and identify the profitability of each revenue source in their firm.
• All new systems developed, tested, and proven throughout the year.
• The skills and tools to effectively interview referral sources.
• The tracking tools to maintain referral relationships, by using the LWP Referral Management System™.

TEAM MEMBERS WILL LEARN...

• Advanced marketing strategies, including the LWP Referral Management System™, that drives referrals to your practice.
• How to develop a practice that operates consistently with your marketing message.
• The key meetings required for successful cash flow and firm growth.
• How to connect with other LWP staff members and team leaders.
LWP COMMUNITY IS EVERYWHERE

“We believe that being a part of LWP has visibly increased our bottom line, while at the same time publicly rebranding our practice as the community experts in estate planning.”

ROSS D.
PAY PER TRUST

Discover how smart attorneys are growing their practices...without spending countless hours drafting trusts or hiring extra help.

On Demand “Pay Per Trust” Model is ideal for attorneys that want to “Test Drive” the LWP Drafting documents or transactional attorneys that just have a few cases come across their desk.

Either way, Pay Per Trust provides you with sophisticated, efficient, and accurate documents with no up front investment or expensive monthly commitments...

PAY ONLY WHEN YOU HAVE A CLIENT READY TO WRITE YOU A CHECK!

Finally, a solution for busy attorneys who don’t have the time, staff, or software to generate comprehensive trust documents for their clients.

- Take advantage of the nationally-acclaimed Lawyers with Purpose™ drafting software
- Spend more time meeting with clients and less time drafting
- Increase productivity and profits without increasing staff

WORRY NO LONGER!

Have confidence in the Pay Per Trust model that allows you to pay only when you have a client that is willing to write you a check.

LEVERAGE THE POWER OF AWARD-WINNING DRAFTING SOFTWARE...
WITHOUT THE COMMITMENT!

Using the LWP-CCS as our drafting software has made customization of estate plans incredibly simple. In our workshops, we utilize a variety of different examples that showcase how simple or complex an estate plan can be and the LWP software makes that possible. I remember when I first sat down to learn it, I felt overwhelmed because of all the different options to check or not check. However, all of those different options are what makes attorneys that use their documents stand out - customization of estate plans. It makes it fun!

JENNIFER R.
PAY PER TRUST PROCESS

YOU COMPLETE DESIGN TEMPLATE AND PROVIDE TO LWP

YOU REVIEW DOCUMENTS
Make changes in “show changes” format

YOU COMPLETE DESIGN TEMPLATE AND PROVIDE TO LWP

YOU PRINT AND ASSEMBLE DOCUMENTS*
*Service available by LWP for additional fee*

LWP REVIEWS AND FORMATS CHANGES
Within 2 business days

LWP PREPARES DRAFT OF TRUST
within 5 business days

YOU PRINT AND ASSEMBLE DOCUMENTS*
*Service available by LWP for additional fee*
## Membership Levels

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<thead>
<tr>
<th>Plan</th>
<th>LWP Bronze</th>
<th>LWP Gold</th>
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<tbody>
<tr>
<td><strong>Workflow CRM Cloud-Based Software</strong>&lt;sup&gt;**&lt;/sup&gt;</td>
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<tr>
<td>Trust Software</td>
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<tr>
<td>Will, Healthcare, Power of Attorney, Personal Care Plan &amp; RLT (Base/Enhanced)</td>
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<tr>
<td>Irrevocable Trust System</td>
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<td>iPug® Asset Protection (MIT™, FIT®, KIT®)</td>
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<td>Non-Grantor Trust (LLIT/TAP™/CGT™)</td>
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<td>Special Needs Trust (SNT)</td>
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<td><strong>LWP™ Exclusive Software - The Only Organization in the Industry that Offers:</strong></td>
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<td>Miller Trust (Qualified Income Trust)</td>
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<td>VA Income &amp; Net Worth Calculation Eligibility &amp; Marketing Software</td>
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<td>VA Application Software (Formal &amp; Informal)</td>
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<td>Medicaid Eligibility, Asset Allocation, Marketing Software, Promissory Notes &amp; Personal Caregiver Agreements</td>
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<tr>
<td><strong>Practice Workflow Systems</strong>&lt;sup&gt;**&lt;/sup&gt;</td>
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<td>Relationship Marketing System (Lead Generation)</td>
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<td>Client Engagement System (Lead Conversion)</td>
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<td>Estate, Disability, Tax, Asset Protection &amp; Elderlife Planning System</td>
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<td>Medicaid Application Tracking System</td>
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<td>Client Maintenance System</td>
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| Two Base Seats for the Actionstep LWP Workflow System | | **

| **Member Support** |            |          |
| 24/7 Colleague ListServ | | |
| Live Weekly Member Interactive Case Study Analysis | | |
| Legal Technical & Software Support | | |
| Web Based Legal Technical Training | | |
| Bi-Weekly Marketing Roundtable | | |
| Tri-Monthly Live Interactive VA Webinars | | |
| Live-In-Room Practice With Purpose Training | | * |

| **Practice Development** |            |          |
| Personal Practice Advisor that Provides Coaching, Consulting & Implementation to your team and facilitates: | | |
| Monthly Firm Revenue Tracking & Measurement Monthly | | |
| Create and Track Short & Long Term Marketing Strategy & Plan | | |
| Monthly Firm Revenue Tracking & Support | | |
| Set Team Rules of Engagement | | |
| Ongoing Development of Firm Accountability & Measurement Standards | | |
| Define Team Roles & Responsibilities | | |

| **Practice Enhancement** |            |          |
| Tri-Annual Meetings to Focus on: | |          |
| Enhance Use of Practice Systems and Software to Multiply Your Practice | | |
| Set Annual & Quarterly Goals to Use for Practice Development | | |
| Cutting Edge Legal Technical Focus Sessions | | |
| Practical Marketing Strategies and How to Implement Them | | |
| Personal Development of Thinking & Knowledge Required for Exponential Growth | | |

** HotDocs & Actionstep for purchase through a third party

[www.joinlwp.com](http://www.joinlwp.com)