

## **Re: WealthCounsel Testimonial**

I was probably one of the rare members who did not have any estate planning experience before joining WealthCounsel. When I decided to become an estate planner, I knew I needed to figure out how I could distinguish myself from so many other estate planning attorneys in town.

One of the areas was making sure that I could provide very high quality estate planning documents. After doing a lot of research, I found WealthCounsel and its drafting system. I asked many local estate planning attorneys about what kind of systems they used for drafting documents. I was surprised to find out that they were simply cutting and pasting client information into their templates. Essentially, they were not able to provide high-quality documents, customizations, efficiency, ability to update documents based on new changes in the law and the latest trends in the clients' desires (for example, moving away from mandatory distributions etc.).

So when I was deciding whether or not to join WealthCounsel, I felt like I almost had to make a decision on what kinds of fees I was going to be able to charge - based on what I would be providing. I did not want to start out charging lower fees and slowly increase them over time. I wanted to start out charging higher fees right away. But I also knew that I was not going to be able to do that if I was using the same template for every client with cut-and-paste style of drafting.

I felt that in order for me to be able to say that I provide a much higher quality work product; I had to have a first-class drafting system. So instead of pricing my plans at \$1500 like many non-WealthCounsel attorneys, I decided to get access to high-quality work product and charge \$3000 to \$5000 per plan. My very first estate plan was \$7500 and my second \$9500. The only way I was able to offer these documents (including special needs trusts, life insurance and retirement trusts) at these fees was because of WealthCounsel drafting system and education and co-counseling opportunities that come with it.

In short, I'm not able to compare my before and after WealthCounsel revenues since I never drafted an estate plan without the system. But what I can say is now I'm able to review estate planning documents drafted by non-WealthCounsel attorneys and point out deficiencies and problems with those documents. I now had several clients who hired me to redraft their estate plans based on the superiority of the drafting system I have access to. My average fees are \$3000 to \$5000 per plan.



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