



Unbundled Attorney Enrollment Script - Estate, Guardianship and Probate

STEP 1: Intro and Ask Client to Tell You What's Going On

Outbound (Calling Clients): I am calling for <Client>. <Client>, this is <Your Name> over at the <Law Firm Name>. <Client>, we received your request for assistance with your <estate law or probate> matter. Is it a good time to talk?

<Zoom Invite>: I typically do my consultations in person or via zoom so we can have an opportunity to connect face to face. if you would like, I can go ahead and send you a Zoom link. What phone number or email do I send it to?

<WAIT ON THE PHONE UNTIL THEY RECEIVE THE LINK AND ARE ON ZOOM. If they give push back on the Zoom, you can discuss the initial aspects of their case and then offer an in person FTF, or proceed with enrollment over the phone>

Okay <Client>, tell me a little bit about what's going on and I'll figure out how to help you. *(Let them explain problem for 1-2 minutes) and then ask questions below)*

STEP 2: LISTEN and Ask Clarifying Questions

ESTATE PLANNING	GUARDIANSHIP	PROBATE
Are you married? <Yes> We should create your estate plans together, would they be available to meet with me as well?	What is your relationship to the incapacitated person?	When did <Decedent> pass away? Where did they live?
Do you have any children?	What is the nature of their incapacity? Follow-up: Can they communicate or are they non-verbal?	Do you know if they had a will/trust? If so, do you have the original or a copy?
Tell me more about your family, is there someone besides your spouse and children that you would like to leave something to?	Who is their primary caretaker?	Do you know of any out of state property they may have had?
If you had to choose someone to be in charge of your estate after you're gone, who would you pick?	Does the incapacitated individual have a spouse, siblings, parents, or other immediate living family members?	Surviving Heirs:
Do you have any estate plan documents already, like a will, trust, power of attorney or health care proxy?	Is there already a guardianship or POA in place? <Yes> Who is the current guardian/POA agent?	Did they leave a spouse? Any children?
	Do you expect this guardianship to be contested?	Did they have any children that predeceased them?

STEP 3: Find Out Client's Primary Goal and Immediate Legal Need

Ok, <Client>, if you could have your <estate plan or probate matter in court> turn out exactly the way you want, what would you like to see happen? Just be as specific as you can. *<repeat back client's goal to them, then ask, WRITE IT DOWN>* Is there anything else?

STEP 4: Discuss Next Legal Steps and Scope of Work

Okay, so I understand what you need, and I can help you with this matter. I have handled a lot of matters like this, and I will do everything I can to make sure we accomplish your objectives.

The next thing that we need to do is prepare and/or file ABC (will, living trust, power of attorney or application to probate, etc.) so we can accomplish XYZ (*Client's Primary Goal*).

<Example: "Your dad died, and you need to get, the house listed and access to his bank accounts. (Client's Primary Goal) You will need to file an application for probate and get creditors served and secure the court document necessary to get (Client's Primary Goal). ">

STEP 5: Educate on Traditional vs. Unbundled Model

Ok, have you spoken to any other attorneys about this?

Yes: Did they give you an idea of what they would charge to handle this?

No: Do you have an idea of what most lawyers typically charge to handle this?

<Client>, our firm is a lot more affordable because we allow our clients to start with a much lower initial deposit and then make payments along the way, so they can afford to have quality representation.

STEP 6: Provide a Quote with a Deposit & Payment Plan Outlined

To assist you with this matter, we will charge a (*flat fee/initial retainer fee*) of <\$ Amount>. Now if you don't have that much available right now, that's fine. We can come up with a payment plan that's going to be workable for your budget, ok?

How often do you typically get paid? *<Weekly, Bi-Weekly, Monthly>*

Typically, what we can do in these cases is \$ _____ per *<week, bi-weekly, monthly, (try to avoid monthly payments)>*, and we will also need \$ _____ (*Deposit Amount Required*) before I can start representing you, ok?

What do you think you can put down as a deposit so we can get started?

1. *If they give a deposit amount that works:* Great, let's start with that as a deposit, and then we will set up the payment plan while we are on the phone together.

2. *If they offer to pay faster:* Great, we offer a 5% discount on the total if everything is paid for in the first 30 days. Let's take the first deposit today and get everything scheduled so we can get started on your case.

3. *If they say that they can't pay the full initial deposit:* That's okay. Let's get started on the payment plan right now, and we can file your case as soon as you've made enough payments to cover the initial deposit. That way, we have a plan in place, and we can get started preparing your case today.

4. *If they say that the recurring payment part of the plan doesn't work:* That's okay. Tell me what you are able to afford (weekly/bi-weekly/monthly) so I can go ahead and get started on this for you.

5. *If they don't provide any answer at all.* I am here to help you, and I am happy to work with you. What can you put down today so I can get started right away? Can you do X? Can you do Y?

STEP 7: Process Deposit, Set Up Payment Plan & Fee Agreement

Okay great, so I'm going to open a new file now and get started on the initial intake. What is the exact spelling of your name? Okay and your mailing address? Okay, and your best contact numbers? Okay and your email address? Okay, and your date of birth? Okay, and for the initial <\$Amount> deposit, you can use a debit card, credit card, or we can set up a bank draft. Which would you like to use?

Perform the following steps in real time while *they are* still on the phone, if possible:

1. Open a Merchant Service application (on a mobile device or on your computer) and process the Initial Deposit either by taking their card/bank details yourself or sending them a payment link to process payment in **real-time**.
(Important Note: Do NOT just email them a link they can use to pay later; have them pay the deposit right now)
2. Schedule the automatic recurring payment plan *(Weekly/Bi-Weekly/Monthly)*
3. Email engagement letter and/or fee agreement to client for digital signature using a signature program such as Clio Grow, DocuSign, Adobe Sign, etc. and have the client review and sign in **real-time** if possible as well.
4. Reiterate the next steps you will take and any steps the client needs to take. Schedule the next appointment.