

TURNING PROBATE LEADS INTO LISTINGS

www.AllTheLeads.com



YOUR HOSTS FROM ALL THE LEADS

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www.AllTheLeads.com/ReferralEx



WHAT TO EXPECT TODAY

- ✓ What is Probate?
- ✓ The Numbers Behind Probate
- ✓ Opportunity With Probate
- ✓ How to get Probate Leads
- ✓ Marketing for Probate Listings

- ✓ Building Your Probate Team
- ✓ Using a Proven System
- ✓ Automating Your Probate Listings
- ✓ Question & Answer Session

WHAT IS PROBATE?

Probate is a legal process. Filing probate documents is the first step in the legal process of administering the estate of a deceased person, resolving all claims and distributing the deceased person's property under a will.

- ✓ If an estate has assets or debt probate is necessary
- ✓ Trusts are usually not probated (only 5% of population)
- ✓ Most states use attorneys although it is NOT required by law

THE NUMBERS

Opportunity in the Marketplace

- ✓ Boomers will inherit up to \$136 TRILLION in next 4 decades ^{1., 2.}
- ✓ Average inheritance value in USA is \$176,814 ^{2.}
- ✓ Less than 30% of wealth advisors address inheritance strategy ^{3.}

1. Huff Post
2. CNN Money
3. OnWallStreet.com

OPPORTUNITY WITH PROBATE

Stop Begging for Listings...Attract Them!

- ✓ Very little competition if any
- ✓ These are people who WANT professional help
- ✓ Strong motivation to sell and settle the estate
- ✓ Create a lasting impact and develop an untapped niche in your market

HOW TO GET PROBATE LEADS

- ✓ Go to Your Courthouse (usually County Clerk's Office)
- ✓ Pull Records and Review
- ✓ Hand Write Deceased Name, Executor Name, Executor Mailing Address, etc.
- ✓ Put all of this info into a spreadsheet when you get back to your office
- ✓ Manually skip trace each lead to find phone numbers
- ✓ Repeat monthly

MARKETING FOR PROBATE LISTINGS

Who to Market To:

- ✓ Personal Representatives
- ✓ Probate Attorneys
- ✓ Sphere of Influence
- ✓ Nursing Home/Retirement Home Program Coordinators
- ✓ Family Law/Estate Planning Attorneys

MARKETING FOR PROBATE LISTINGS

Marketing Best Practices

- ✓ Direct Mail – We recommend a min. of 3 very unique letters
- ✓ Phone Calls – We recommend a min. of 3 calls (1 after each letter)
- ✓ Networking – Introduce yourself as the Expert in your community every chance you get

BUILDING YOUR PROBATE TEAM

Key Partners to Help You Provide Multiple Options to Sellers & Differentiate Yourself from Competition

- ✓ Cash Buyers
- ✓ Estate Sale Company
- ✓ Contractors
- ✓ Clean Out Crew
- ✓ Title Company/Attorney

WHAT WE DO AT WWW.ALLTHELEADS.COM

- ✓ Provide Probate Leads to Your Email Monthly
- ✓ Contact Information for Personal Rep. and Attorney (includes phone #s not on public data)
- ✓ 50+ hrs. of Professional Training Included (Video, audio, print)
- ✓ Proven Letter Templates to Customize
- ✓ Automated Direct Mail Services
- ✓ Custom Wordpress Probate Websites
- ✓ Advanced Training with Professional Designation – *Certified Probate Expert*®
- ✓ *Weekly Probate Mastermind Calls – Agents/Brokers across the country*
- ✓ *Monthly Probate Role Play Calls - Agents/Brokers across the country*
- ✓ *Very Active 500+ Member Facebook Community where Agents/Brokers Help Each Other*

“I have been doing probate sales for 2 years. In those 2 years I did 2 probate sales. After signing up for All The Leads, and completing the Probate Mastery 1-on-1 Training, I have closed 4 probates in 2015. I highly recommend you make all The leads a vital part of your business.”

Bill B – Marin Co. CA



“I wanted to share a quick success story with you. I sent my first 92 probate mailers out last week and have three appointments already worth roughly 1 Million in listing volume. These appointments were from sellers responding to the mailer. I am calling the leads this week and can't wait to see what the results of picking up the phone and reaching out to this group will be.”

Robbie M. – Virginia Beach



ADDITIONAL RESOURCES

Free Resources to Learn More About Probate

- ✓ Google “Probate Court _____”
- ✓ Visit www.AllTheLeads.com/FAQ/Probate-FAQ
- ✓ Visit your Local Courthouse and Speak with Probate Clerk

QUESTION & ANSWER

AlltheLeads.com/FAQ/probate-FAQ

You can absolutely do this on your own
but we can help you beat the learning
curve and quickly become THE Probate
Expert in your community.

Jim Sullivan at 954-584-0000

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