American Academy of Estate Planning Attorneys

Frequently Asked Questions About Academy Membership

GENERAL MEMBERSHIP

Are there any fees in addition to the Membership fee?	• Cost is passed on to Members for replenishable items/supplies such as portfolio binders purchased in volume. • Outside vendors have negotiated many lower rates for services provided to Academy Members. (Bank of America, DocuBank, Tape duplication, binder manufacturing, Office Depot, and many more). • Custom web site available for Member law firms at additional charge.
How many Academy employees support Members?	1 employee per every 4 Member law firms.
How many Members are currently supported?	Approximately 120 law firms
What is the goal for Membership?	Approximately 200
Is there a limit to the number of attorneys or staff per law firm the Academy will support?	No limit to the number of attorneys or staff. The Academy does request that the Education Department is available to attorneys only.
Do Academy Members practice in areas of the law other than Estate Planning?	Not generally, the vast majority of Members concentrate only on Estate Planning or related work.
How is the Geographic Exclusivity a Membership benefit?	The *Membership Agreement* ensures that marketing materials, documents and other benefits are not available to every attorney in town! This benefit is available due to an overwhelming request from the Membership. This ensures that Academy Members are located evenly around the country, it sets the stage for *no competition* between Members! The open and supportive Member relationships are directly related to the exclusivity.
If my Academy Territory grows in population, will the Academy change the number of attorneys allowed in my market?	Membership is initiated with a written agreement outlining the number of attorneys in your specific geographic territory. This "territory" is determined by population, media support area, geography and availability along with consideration given to where a prospective Member's existing client base is located. The agreement is firmly in place until either the Member or the Academy terminates the relationship.

Will the Academy reserve a territory for me? I need to work out some arrangements before joining.	Unfortunately, the Academy is not able to "reserve" or hold territories for any length of time. The **Academy does not hold territories for anyone.**
Do Members have to pay the $9500 initiation fee again if they opt to add an additional territory?	No. The $9500 is a Membership initiation fee. Once Members are on board, if they decide to pick up another territory, we outline the geographic region with the Members, create another agreement and the Members begin paying an additional $1595 per month.
What departments make up the Academy?	• Marketing & Public Relations • Continuing Legal Education • Web & Tech Services (Including software and development) • Member Services & Practice Building • Membership Recruiting
How many Events are held each year and what is the cost to attend?	There are approximately 2-3 events per year. One seat per Membership is included in the monthly fee for all Academy Summits. Additional seats are $295.

EDUCATIONAL AND DOCUMENT SUPPORT

How is the Education Department Staffed?	Department Director with J.D., LL.M (Tax), CFP, RFC, EA, Certified Taxation Law Specialist, Certified Estate Planning, Trust & Probate Law Specialist as well as the Academy Education Associate Director and Staff Attorney both with a J.D. and an LL.M (Tax).
How are substantive questions handled or accepted?	Unlimited Fax, Email, Phone, In Person availability. Education is available for attorneys in Member firms.
Are there limitations to the types of questions one can present the Education Department?	Yes. The questions obviously are limited to the topic of Estate Planning. Also, the Education Department can provide so much information to Members yet they are not available "to practice law *for* a Member." They will often provide coaching and point Members in the direction of additional support materials they may need for the particular topic the Member is working on.
What is the turnaround time for requests made for educational/ substantive support?	Generally, same day response.
What type of substantive training is available?	2–3 Conferences per year (Members and their attorneys or staff only), plus monthly 2-3 hour training conference calls on specific Estate Planning topics.
What communications are provided by the Education team?	Weekly email updates on changes in the law, summaries of articles or Estate Planning developments as they occur.
What are the additional Educational benefits?	Annual Tax Law updates for most Academy materials, updates to Academy documents, review of marketing materials, as well as FYIs Concerning IRS Announcements, Tax Court Cases, Revenue Rulings and Malpractice Alerts.

SOFTWARE & TECHNOLOGY

Does the Academy offer estate planning documents?	Yes, proprietary software for state specific RLTs, ILITs, FLPs, CRTs, SNTs and more! Documents print in MS Word.
When were documents written and last updated?	Originally created in the 80s, a major rewrite and update occurred in 1993. With continuous updates, the most recent *rewrite* was in 2002.
Are the documents customizable?	Completely customizable. Documents are extremely comprehensive and may need only state specific changes.
Does the Academy provide a database for management of clients and prospects?	The "Complete Activity Tracking System" is based on MS Access. The proprietary database includes **over 250 letters and forms** to support clients and to market to prospective clients. "CATS" also includes **over 40 management reports** tracking results of events or types of services/revenue generated and sources of clients. Moreover, it is the central resource for managing all the activities of your prospects and clients.
Does the Academy provide software training and support?	Over-the-phone installation, training and follow-up support available. Also in person hands-on training available at conferences and online.
Does the Academy have a Members only private web site? If so, what is available?	Yes, there is a Members only web site. Over 950 web pages of past event audio and video recordings and materials, all forms, documents, all seminar PowerPoint files downloadable, software updates and materials.
Can Members have customized law firm web sites created and maintained?	Yes. The fee to set up this customized web site is $660. The monthly fee for maintaining the site is $85. Various Academy articles can be made available on your web site, as well as any special Member requests.

PRACTICE BUILDING

How many Practice Building Coaches/ Consultants are on staff?	1 per 20 Members
Do they support or offer training assistance for you or your staff?	Complete training programs for a wide range of Marketing functions, conducting Final Signing meetings or Initial Consultations, Document Production, Funding, Trust Admin systems, including individual coaching on all aspects of implementation. Programs available online, by phone and at conferences. *No extra charge!*
What management and planning support or materials are available?	Employee Handbook template, modules for hiring & training employees (including ads, offer letters etc), Strategic Planning instruction, analysis and coaching, Marketing Planning support and Reports, Business Plan tools.

MARKETING

Are marketing letters and advertising materials provided?	Over 400 customizable letters, postcards, ads and inserts with instruction and coaching for all aspects of use and follow-up.

Are there seminar/ speaking materials available?	Included in the cost of Membership are many 2-hour programs for the public or for professionals (most programs include slides, script, handout, reports, associated ghost written articles, evaluation forms and follow up procedures): • Basic Estate Planning • What to Do When a Loved One Passes Away (Trust Admin/Probate) • Lawsuit and Asset Protection • Estate Planning with IRAs • GLBT Seminar • Estate Planning for Farmers/Ranchers, Medicaid Planning Workshop • Special Needs Seminar • ILIT, FLP, CRT Seminars • 30 minute customized presentations for small groups and more!
What Marketing materials support speaking engagements?	Customizable • Ads • Inserts • Direct mail letters and planning tools **Plus** • Professionally printed Seminar Handouts by topic • Seminar Evaluation forms • Slides/Script • PowerPoint file for LCDs • Instruction/Coaching on room arrangements and followup.
What types of tools are available for building relationships with professionals and cultivating referrals or private speaking engagements?	• Numerous **complete CE courses** available (Basic Planning, IRA, Business Succession Planning etc.) for Members to educate professionals in their area, including course approval, set-up and marketing materials to draw participants. • Monthly fax/email alerts for Members to send advisors (archive of more than 100). • Endorsed Seminar Marketing Module. • Sample introduction or follow up letters and proposals.

What Public Relations/Image Building tools are available?	• New monthly ghostwritten articles ready for publication (archive of more than 250).
	• Talking Points Press Kit for Media Interview.
	• Office Image Package with professionally designed:
	  • Business Cards, Stationery.
	  • Law firm brochure.