

KNOWING, COMMUNICATING AND DELIVERING YOUR

VALUE

PROTECT YOUR STUFF
WORKSHOP

TRAIN THE
TRAINERS

TRI-ANNUAL PRACTICE
ENHANCEMENT RETREAT

PRACTICE
WITH PURPOSE

ST. LOUIS, MO | JUNE 1-5, 2015

TRAVEL INFORMATION



LAMBERT — ST. LOUIS INTERNATIONAL AIRPORT

HILTON ST. LOUIS AIRPORT

10330 Natural Bridge Rd, St. Louis, MO 63134

(314) 426-5500

Hotel Cutoff: May 15, 2015

Rate: \$119*/night



*first come, first serve basis

YOUR WEEK

AT-A-GLANCE

PRACTICE WITH PURPOSE PROGRAM

Monday - Wednesday

TRAIN THE TRAINERS: SPEAKERS SCHOOL

Monday - Tuesday

HOW “PROTECT YOUR STUFF IN 3 EASY STEPS”
NOT ONLY GETS CLIENTS BUT TRANSCENDS EVERY
ASPECT OF YOUR LAW BUSINESS

Wednesday

TRI-ANNUAL PRACTICE ENHANCEMENT RETREAT

Wednesday - Friday

THINGS TO DO IN ST. LOUIS

Ameristar Casino	2.0 MI	Gateway Arch	8.0 MI
Anheuser Busch Brewery	10.0 MI	Grant's Farm	10.0 MI
Ballpark Village	8.0 MI	Harrah's Casino	8.0 MI
Busch Stadium	8.0 MI	Laciede's Landing	8.0 MI
Cathedral Basilica	5.0 MI	Missouri Botanical Gardens	10.0 MI
City Center	11.0 MI	Scottrade Center	8.0 MI
Edward Jones Dome	11.0 MI	St. Louis Outlet Mall	2.0 MI
Forest Park	6.0 MI	St. Louis Zoo	6.0 MI

Come to the Tri-Annual Practice Enhancement Retreat to get practical marketing and market presence ideas which are tried & proven successful marketing strategies in the market place TODAY. **CSILLA S.**

It is a continued necessity to achieving a habit of improving your practice. It is a must for all team members be exposed to this experience. **JEFF B.**

YOUR WEEK AT-A-GLANCE

Monday			Tuesday		Wednesday	
8:00	Practice With Purpose (new members & refresher)	Train the Trainers: Speaker School (open to all)	Practice With Purpose (new members & refresher)	Train the Trainers: Speaker School (open to all)	Practice With Purpose (new members & refresher)	How “Protect Your Stuff in 3 Easy Steps”
9:00						
10:00						
11:00						
12:00	Lunch		Lunch		Lunch	
1:00	Practice With Purpose (new members & refresher)	Train the Trainers: Speaker School (open to all)	Practice With Purpose (new members & refresher)	Train the Trainers: Speaker School (open to all)	Practice With Purpose (new members & refresher)	Opening Session: Communication Transforming Businesses
2:00						
3:00						General Session: Crucial Conversation
4:00						
5:00						Focus Session # 1
6:00						Reception

YOUR WEEK

AT-A-GLANCE

Thursday

Focus Session # 2	
Focus Session # 3	
Firm Retreat Prep	
Lunch	
Individual Firm Retreat	Getting to Firm Retreat

Friday

WHY Day: Communicating Your Values	8:00
	9:00
	10:00
	11:00
Lunch	12:00
WHY Day: Communicating Your Values	1:00
	2:00
Close of Retreat	3:00
	4:00
	5:00
	6:00

SPEAKERS SCHOOL

TRAIN THE TRAINERS

SCHEDULE

	MONDAY	TUESDAY
8:00-9:00	Train the Trainers: Speakers School	Train the Trainers: Speakers School
9:00-10:00		
10:00-11:00		
11:00-12:00		
12:00-1:00	Lunch	Lunch
1:00-2:00	Train the Trainers: Speakers School	Train the Trainers: Speakers School
2:00-3:00		
3:00-4:00		
4:00-5:00		
5:00-6:00		

TRAIN THE TRAINERS

SPEAKERS SCHOOL

TRAIN THE TRAINERS: SPEAKERS SCHOOL

Speakers School is a two day program designed with the LWP™ unique Train the Trainers™ methodology. If your goal is to speak, then Speakers School will get you started, and if you're a pro it will help you "sharpen the saw." Learn the three core qualities that separate excellent trainers from the rest.

What you'll learn in Speakers School...

- The Body Language of Presenting
- Organizing Your Presentation
- Persuasive Presentation
- Making Presentations Interactive
- Responding to Questions: Video Practice
- Impromptus: Presentation Process Skills
- Platform Skills
- Facilitation Skills
- Behavioral feedback
- Personal video and receive a video coaching session
- Learn how to "anchor" your message
- Sequencing and transition in your presentation
- From platform paralysis to platform perfection

The Craft of Training™ ~ the ultimate train-the-trainer curriculum.

Train the Trainer was a game changer. My presenting skills increased dramatically during the program. My confidence soared to incredible places. I am a much better presenter now because of the program and it was an amazing use of my time.

JEFF B.

Limited to 1st

20

registrants

PRICING

TAPER Member	\$ 697
LWP Member	\$ 997
Non-Member	\$2,497

EDUCATIONAL TRAINING

PRACTICE WITH PURPOSE

SCHEDULE

	MONDAY	TUESDAY	WEDNESDAY
8:00-9:00	Practice With Purpose	Practice With Purpose	Practice With Purpose
9:00-10:00			
10:00-11:00			
11:00-12:00			
12:00-1:00	Lunch	Lunch	Lunch
1:00-2:00	Practice With Purpose	Practice With Purpose	Practice With Purpose
2:00-3:00			
3:00-4:00			
4:00-5:00			
5:00-6:00			

PRACTICE WITH PURPOSE

EDUCATIONAL TRAINING

DAY 1 JUNE 1, 2015

8:00 - 8:25	Topic 1 - Welcome & Introduction
8:25 - 8:50	Activity #1 - Goal Setting & Introductions
8:50 - 9:00	Activity #2 - Medicaid Planning Profile™
9:00 - 9:45	Topic II - Principle #1: General Medicaid Laws & Rules
9:45 - 10:00	BREAK
10:00 - 10:40	Activity #3 - What is the CSRA?
10:40 - 11:30	Walkthrough #1 - Penalty Period Scenarios
11:30 - 11:50	Topic III - Principal #2: Qualification Exemptions
11:50 - 12:10	Case Study #1: Mr. & Mrs. Smith Spot the Issues Walkthrough: Determine the Client's Eligibility
12:10 - 12:20	Topic IV - Qualification: Miscellaneous Rules
12:20 - 1:20	LUNCH BREAK
1:20 - 1:35	Morning Debrief (Check in)
1:35 - 2:25	Topic V - The Medicaid Planning Principle #3
2:25 - 3:05	Case Study #2: Miss Brown (Crisis Planning) - Spot the Issues/Walkthrough Case Study - Software Intro
3:05 - 3:15	Gifting
3:15 - 3:35	Topic VI - Crisis vs. Pre-Planning Discussion
3:35 - 3:45	BREAK
3:45 - 4:00	Walkthrough #2 - Crisis Plan
4:00 - 4:10	Walkthrough #3 - Break Even Calculation: Miss Brown
4:10 - 4:55	Case Study #3: M/M Richards Determine the Spend Down Method - Using the MedQual Software
4:55 - 5:05	Walkthrough #4 - Asset Protection Opinion Letter
5:05 - 5:35	Topic VIII - Create the Funding Plan
5:35 - 6:00	Close Day One (Day One Final Debrief)

Limited to 1st

35

registrants

PRICING

LWP Member \$ 595*

Non-Member \$1,200

*Based on membership level

EDUCATIONAL TRAINING PRACTICE WITH PURPOSE

DAY 2 JUNE 2, 2015

- 8:00 - 8:30 Open and It's Your Nickel
- 8:30 - 8:55 Basic Training/Wingspan of VA Pension Benefits & Case Study #1
- 8:55 - 9:10 Drilling Deeper into Pension
- 9:10 - 9:20 Case Study #2
- 9:20 - 9:30 Financial Qualification - Income
- 9:30 - 9:45 BREAK
- 9:45 - 10:00 Case Study #3
- 10:00 - 10:20 Financial Qualification - Assets & Case Study #4
- 10:20 - 10:40 Application Processing & Activity #1
- 10:40 - 11:00 Debrief VA Benefits
- 11:00 - 11:10 Introduction to Mastering Trust Design
- 11:10 - 11:30 Trust Fundamentals
- 11:30 - 12:30 LUNCH
- 12:30 - 2:00 Trust Fundamentals
- 2:00 - 2:15 BREAK
- 2:15 - 2:45 Trust Fundamentals
- 2:45 - 3:15 Estate Planning Documents
- 3:15 - 4:00 Design Strategy
- 4:00 - 4:15 BREAK
- 4:15 - 4:35 Trust Design Template & Activity - Client #1
- 4:35 - 5:15 Design Template - Access & Activity - Client #2
- 5:15 - 5:45 Design Template - Access/Control & Activity - Client #3
- 5:45 - 6:00 Design Template - Control/Miscellaneous
- 6:00 - 6:30 Debrief Trust Design

PRACTICE WITH PURPOSE

EDUCATIONAL TRAINING

DAY 3 JUNE 3, 2015

8:00 - 8:30	Open & It's Your Nickel
8:30 - 8:50	Open Mastering Client Attraction & Retention
8:50 - 9:00	Natural Responses Activity
9:00 - 9:10	MIFY and Reflecting
9:10 - 9:30	Synergy Meeting (Teach & Video)
9:30 - 9:45	BREAK
9:45 - 10:15	Wagon Wheel Reflecting Practice
10:15 - 10:25	Positive/Negative Live Reflecting Demo
10:25 - 10:40	Enrollment w/ Initial Contact & Initial Meeting
10:40 - 11:00	Workshop & Demo clips
11:00 - 11:25	Vision Mtg Teach & Demo: Parts 1 & 2
11:25 - 11:50	Vision Discovery Triad Practice
11:50 - 12:00	Questions/Debrief morning
12:00 - 1:00	LUNCH BREAK
1:00 - 2:30	Tri-Annual Retreat - Opening Session
2:30 - 2:45	BREAK
2:45 - 4:15	Tri-Annual Retreat - General Session
4:15 - 4:30	BREAK
4:30 - 4:45	Vision Mtg. Parts 3, 4, 5: Teach & Demo
4:45 - 5:15	Vision Mtg. Parts 3, 4, 5: Value Proposition Pair Practice
5:15 - 5:30	Return to "Natural Responses"
5:30 - 6:00	Close Day Two (Day Three Final Debrief)
6:00 - 8:00	Tri-Annual Welcome Reception - Join our members to get a sense for the feeling of community LWP offers

PROTECT YOUR STUFF

SCHEDULE

WEDNESDAY

8:00-9:00	How “Protect your Stuff in 3 easy steps” not only gets clients but transcends every aspect of your law business
9:00-10:00	
10:00-11:00	
11:00-12:00	
12:00-1:00	Lunch

This workshop was very informative. It's interesting how it is presented on a personal level that made us feel comfortable and like we were just having a conversation with the presenter. We never thought about estate planning before the workshop and when we left we were 100% sure we had to get our plan in place immediately.

JOSEANNE E.

Before I attended an Estate Planning Workshop, I thought I was all set and had nothing to worry about, well I was totally wrong, I now have a plan in place that takes all burdens off my loved ones and I can rest easy knowing my family will be taken care of. I don't know why anyone wouldn't attend one of these workshops.

MARIA M.

PROTECT YOUR STUFF

SPECIALTY PROGRAM

HOW “PROTECT YOUR STUFF IN 3 EASY STEPS” NOT ONLY GETS CLIENTS BUT TRANSCENDS EVERY ASPECT OF YOUR LAW BUSINESS

Designing workshops to be the center of your entire value proposition to the marketplace

- How to ensure there are butts in the seats
- Set expectations for prospects
- Demonstrate your values
- Transforms complex legal-technical into simple stories clients relate to
- Enroll into lifetime clients instead of just document creation
- The difference between teaching law vs. teaching stories
- A system for measuring the effectiveness of stories
- Evaluation and enrollment into action: A.C.T.
- The difference between having planning vs. documents
- How to open, how to deliver the message, how to close a workshop

You will leave with the NEW “3 easy...” workshop complete packaging (handouts, PPT, overheads, speakers notes, evaluations, marketing materials, video & audio of the workshop, audio of the stories), etc.

Limited to 1st

40

registrants

PRICING

TAPER Member	\$197
LWP Member	\$397
Non-Member	\$697

TRI-ANNUAL PRACTICE

ENHANCEMENT RETREAT

SCHEDULE

WEDNESDAY		THURSDAY		FRIDAY
8:00-9:30		Focus Session #2 (choose 1 of 3)		WHY Day
9:30-9:45		Break		
9:45-11:15		Focus Session #3 (choose 1 of 3)		
11:15-11:30		Break		
11:30-12:00		Afternoon Prep		
12:00-1:00	Lunch	Lunch		Lunch
1:00-2:30	Opening Session	Individual Firm Retreats	Getting to Firm Retreat	WHY Day
2:30-2:45	Break			
2:45-4:15	General Session: Crucial Conversations			
4:15-4:30	Break			
4:30-6:00	Focus Session #1 (choose 1 of 3)			

TRI-ANNUAL PRACTICE

ENHANCEMENT RETREAT

SESSION DESCRIPTIONS

Opening Session: Communication Transforming Businesses

Wednesday, June 3
2:45pm - 4:15pm

The Future of your law firm; how you communicate with your values with unified communications, collaboration, community and power partners.

Strategic Planning for Qualified Assets

Wednesday, June 3
4:30pm - 6:00pm

Distinguish what assets are "qualified" for tax purposes including IRA's, 401(k)s, and annuities and how to plan for them when estate planning, tax planning, and asset protection planning.

General Session: Crucial Conversations

Tools for Talking When Stakes are High

Wednesday, June 3
2:45pm - 4:15pm

Learn the tools to how to get unstuck with best practice skills for high-stake interactions with clients, referral sources, employees, co-workers, bosses and everyday conversations and situations.

Adding Insurance Services to your Law Practice

Wednesday, June 3
4:30pm - 6:00pm

Discover how to bridge the gap between legal and financial solutions even if you have little hands on experience with financial services and how they might be the perfect addition to your current practice.

PRICING

Monthly (3 TAPER)	\$ 595
Per TAPER Fee	\$2,997
Additional Staff	\$ 395*

*over 3 attendees

Actionstep: The Relationship Management System™ (RMS) Workflow

Wednesday, June 3
4:30pm - 6:00pm

Learn the complete RMS workflow system, How to track and measure all referral sources and how to keep everyone in the office on the same page with referral relationships making it easier to track and hold each other accountable

TRI-ANNUAL PRACTICE ENHANCEMENT RETREAT

SESSION DESCRIPTIONS

Comparing the Three LWP Workshops

Thursday, June 4
8:00am - 9:30am

Get an understanding of all three LWP workshops with a side-by-side comparison, what stories are in each, which are not and how to make the stories your own.

Comparing the Three LWP Workshops cont'd

Thursday, June 4
9:45am - 11:15am

Get an understanding of all three LWP workshops with a side-by-side comparison, what stories are in each, which are not and how to make the stories your own.

In-The-Room Collaborative Marketing Roundtable: Wholesale and Retail Approach

Thursday, June 4
8:00am - 9:30am

A facilitated panel of successful LWP members with a RETAIL approach to Marketing. Walk away with knowing exactly how much team time, attorney time, monthly costs and ROI on each strategy shared.

In-The-Room Collaborative Marketing Roundtable: A Retail Approach

Thursday, June 4
9:45am - 11:15am

A facilitated panel of successful LWP members with a WHOLESALE and COMMUNITY approach to Marketing. Walk away with knowing exactly how much team time, attorney time, monthly costs and ROI on each strategy shared.

LWP Boot Camp

Thursday, June 4
8:00am - 9:30am

An Overview of the LWP™ Systems and Processes- An understanding of the “big picture” – how all the systems fit together. An overview of all of the LWP™ systems, so you know what’s out there to leave you with a better equipped for any position in the firm because they understand how each piece of the puzzle fits.

Managing the Business of Law

Thursday, June 4
9:45am - 11:15am

How an effective law firm manager can guide the office to greater successes in a highly efficient and synergistic manner. How to establish the responsibilities of the position, how to select and prepare the right individual and effectively make them lead the team.

TRI-ANNUAL PRACTICE

ENHANCEMENT RETREAT

SESSION DESCRIPTIONS

Individual Firm Retreat

Thursday, June 4

1:00pm - 6:00pm

A dedicated, uninterrupted half day to create your Law Firm “Money Plan™” to get to revenue goal in just four months. LWP will facilitate how to conduct your firm retreat in a way that allows for your firm to uncover coworkers’ hidden talents, re-energize your team, and encourage cross-departmental collaboration while creating an achievable path and plan to your firm revenue goal.

Getting to Firm Retreat

Thursday, June 4

1:00pm - 6:00pm

For NEW LWP member firms and solo attorneys or LWP members attending the TAPER without team. The LWP leaders will personally facilitate a Firm Retreat until you and your team are ready to go off on your own.

WHY Day:

Communicating your Values

Friday, June 5

8:00am - 3:00pm

Do you know your core values, whether they are faith based or not? How do you communicate your values? Is it communicated through your actions or your words? This will be a high-energy session and you will learn how to apply your values back into your business.

Do it! There is so much valuable information to take back to your firm. It all just makes sense and will surely make them ‘cents.’

LIZ F.

Come to experience and enjoy a community of like-minded individuals that support each other in terms of both professional and personal development.

SABRINA S.

APS

Asset Preservation Strategies

APS Medicaid Application Back Office uses our deep experience and record of success to work for your firm and your clients. We know the parameters of these programs, the state-by-state rule differences, how to guide the application process and attain successful outcomes and benefits for your clients.

As a full-service Medicaid management consulting firm, we partner with you to deliver planning solutions, implementation of proper Medicaid planning products, and a full-service Medicaid Application Management Service.

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Visit Victoria's table at the retreat for more info,
or email dpapay@OliveGrovePress.com.

"The HIPAA/Medical Release and Oregon Advance Directive/Medical Power of Attorney were immediately faxed to the hospital staff. Crisis averted. I was a hero to the family."

Ryan Collier, Esq.
Collier Law, Salem OR

Go Ahead, Be a Hero. Protect Your Clients' Healthcare Wishes.

- Sizable discount for LWP firms
- Unique marketing benefits for your practice
- Turn-key integration with LWP software

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Instant Access to Vital Documents

VALUES ARE LIKE
FINGERPRINTS.
NOBODY'S ARE THE
SAME, BUT YOU LEAVE
THEM ALL OVER
EVERYTHING YOU DO.

Elvis Presley