



## LECTURE 22 - OVERVIEW

Our experience is that once advisers have facilitated more than 5 estate plans, it becomes part of their firm's culture and a core part of their customer value proposition.

Once estate planning becomes an embedded facilitated solution for an adviser, it can be the launch pad for a variety of other adviser facilitated solutions offered by View in areas such as:

- a. Probate and estate administration;
- b. Business succession;
- c. Entity establishment.

As Nike says, 'Just Do It' or in Seth Godin's words, '[Ship it](#)', or for the video version see [here](#).

Therefore – the next step, if you have not yet completed a facilitated estate plan through View, or have not done so for more than 6 months, is to choose your easiest customer situation – including yourself if your arrangements are not up to date, go to [step 1](#) and start. Now.