WORKING WITH YOUR CLIENTS

If you have trusted us with one or more of your clients, we thank you. We appreciate the degree of trust and confidence that this reflects. We also understand that our process is most effective when we do not attempt to "go it alone." At Sullivan & Griffith, LLP, we work closely with other professional advisors as part of a team. We believe this approach provides clients with the most comprehensive, realistic and effective estate plans. We also try to focus on the practical. Not every client needs a revocable trust. Not every trust should look the same. We want to understand your client's goals and concerns and tailor their plan to address those specifically.

Here are a few lessons that have served us well:

- Listen. Let the client set the priorities.
- Try to understand family dynamic.
- Provide flexibility – unless you shouldn't.
- It's not just about the documents -- it's about education and understanding too.
- Coordinate with other advisors – they have invaluable knowledge and expertise.

A trusted financial advisor has indispensable knowledge and experience to contribute to the planning process. The Advisor likely meets with the client in person on a regular basis, and therefore understands concerns and priorities that might not otherwise come to light. We welcome the opportunity to use you as a resource, and to have you at the table when we design and execute a plan. Likewise, having your participation as we work through the correct asset alignment (and trust funding if appropriate) will make the process simpler and easier for clients. We have found that some of the most positive results are achieved when a trusted advisor participates in the funding meeting so the plan is completely executed when the meeting has concluded.

- We can be a resource too.

Even if we are not working together on a specific engagement, we hope we can serve as a resource for you when needed. The following are examples of how we work with advisors:

- **Education.** We love what we do. If you have a question about a plan design – or about something you heard or read, just ask. If we know or can obtain the answer, we will. Our mutual clients are better served when we can share knowledge and information.

- **Joint Marketing.** We are happy to speak to your clients or prospects on a variety of estate planning issues, such as basic estate planning, asset protection strategies, business planning and charitable giving. Please call us the office if you would like to plan a joint workshop or other learning opportunity.

Monthly Newsletter. Each month we produce an electronic newsletter for clients and their advisors. You can subscribe here.