ESTATE PLANNERS - Sample Profiles

Unique ID	712626871	729123100	
Firm Location (City)	Merrimac	North Andover	
Firm Location (State)	MA	MA	
Firm Location (Zip)			
Your firm's geographic range (where you will accept clients from)	Eastern Massachusetts and Southern New Hampshire	Licensed in MA and NH. Primarily focused on the Merrimack Valley area and Southern New Hampshire	
General description of your firm's offerings	We transform the legal, financial, and emotional complexities of life's challenges into sophisticated strategies that protect families and preserve legacies. From the first meeting our experienced team will replace worry with reassurance and create innovative solutions that answer your loved ones' future needs.	We provide effective estate planning for every day families, by taking a genuine interest in our clients, understanding their objectives and meeting and/or exceeding their expectations. Our Firm focuses solely on Estate Planning and Elder Law.	
Specific services or niches your firm specializes in	Comprehensive Estate Planning with the requisite skillset to weave the intricacies of business planning and exiting into the estate planning for the benefit of all parties.	Our services include Trusts and Wills, Probate and Trust Administration, Nursing Home Planning, Incapacity Planning, Preservation of Wealth, Charitable giving, and the effective transfer of one's wealth and legacy to future generations.	
How your firm gets paid (Hourly, Modular, Commission, % of Sale Price, etc.)	Both Flat Price and Hourly depending on engagement.	Flat Fee and Hourly depending on services provided.	
Do you do free initial consultations? 30 mins, 60 mins?	30-min free video consultation	60 mins Virtual or In person	
Number of employees in your firm	4	2	
What makes your firm unique?	We bring all the experience and results that the big Boston firms provide with a high touch and hands on approach of a smaller firm.	Boutique firm that focuses solely on Estate planning and Elder Law.	
Minimum Client size (# of Employees / Revenue / EBITDA etc.)	No minimums	No minimum.	
Industries Services (All or Specific)	All	All	
Other criteria in choosing your prospects		We are relationship focused, and our ideal client will want to work with a firm to develop a long term relationships for generations to come.	
Number of years experience in your field	11	8	
Industry Designations (CFP, CLA, CPA etc.)		Licensed Attorney in Both MA and NH	
Best times to contact you			
Preferred Communication Methods	In Person Phone Email Zoom / Skype etc.	In Person|Phone|Email|Zoom / Skype etc.	
Elevator Pitch / Anything prospective clients should know about you?		We focus on not only providing effective Estate Planning for Business owners and Families to provide optimal wealth to their families, but we also take a counseling approach to our clients to ensure their true legacy is passed onto their family members.	