

**SAVE THE DATE:  
APRIL 24 & 25, 2008**

## Marketing with Integrity ... Estate Planning at Work™

A Two-Day Practice Development Workshop  
for Estate Planning Professionals Focusing on  
**Harnessing Collaboration &  
Marketing to the Business Owner Client.**

**April 24 & 25 • 2008**

The Embassy Suites Hotel  
Country Club Plaza • Kansas City, MO

**Bring An Allied Professional and Get One Registration FREE!**

**In Two Intense Days, You Will Learn How To:**

- **Generate More Revenue,**
- **Attract More Profitable Business Owner Clients,**
- **Nurture Stronger Referral Relationships, and**
- **Get the Most From Your Marketing Dollars.**

— Kyle E. Krull, J.D., CFP®  
President, Integrity Marketing Solutions



1-877-352-2021  
[www.estateplanningpartners.com](http://www.estateplanningpartners.com)



# Estate Planning at Work™



## Marketing with Integrity

# Estate Planning at Work™

April 24 & 25, 2008 • Kansas City, MO

**“May you live in interesting times.”**

**-- an old Chinese curse**

Whatever else may be said about the economy, the environment, and the uncertain estate tax, this is certainly an *interesting* time for estate planning professionals!

In this ground-breaking workshop, you will learn how to convert these *interesting* times into *profitable* ones with the two most powerful marketing and practice development strategies for this decade:

- 1.) **Harnessing Collaboration:** Bringing financial and legal professionals together in collaborative efforts; and
- 2.) **Marketing to Business Owners:** Serving the unique and varied needs of the groundswell of successful business owners created by the changing global economy.

Lace-up your running shoes for this fast-paced, intense practice development workshop that will put you in the lead!



## Day One - Thursday, April 24 Harnessing Collaboration

**8:30 to 9 a.m. — Registration & Introductions**

**9 to 10 a.m. — Keynote Presentation:**

### **Managing Collaborative Relationships**

**Kyle Krull & Jennifer Campbell**

Integrity Marketing Solutions recently completed in-depth research with estate attorneys about the challenges and rewards of working in collaboration with allied professionals, such as accountants, insurance professionals and Certified Financial Planner practitioners (CFP™). During this keynote presentation, we analyze the results of that research and apply key concepts to help both financial and legal professionals collaborate for enhanced profitability and better client service.

**10 to 10:15 a.m. — Break**

**10:15 to 11:30 a.m. — Identifying, Contacting & Establishing Key Collaborative Relationships**

**Kyle E. Krull, J.D., CFP®** — Kyle is uniquely qualified to speak on this subject. Through the years, he has built a strong reputation in both the estate and financial planning professions. He built a successful estate planning practice in prestigious Johnson County, Kansas (an enclave of one of the wealthiest counties per-capita in the country). Relationship

marketing has been the cornerstone of Kyle's practice development, building strong alliances with professional advisors and clients to establish a profitable referral system.

**11:30 a.m. to 1:30 p.m. — Lunch**

**1:30 to 2:30 p.m. — Building Brand Equity**

**Scott Busch, PDM, Lexinet Corp.** — How important is “brand equity” to your practice? Corporate accountants factor the value of a company's *brand equity*. Catalogers collateralize loans with *brand equity*. Even the Armed Forces understand *brand value*. In this session you will learn how to be your own brand manager, and why it's so important to the success of your marketing efforts.

**2:30 to 2:45 p.m. — Break**

**2:45 to 3:45 p.m. — Choosing Your Marketing Channels**

**Scott Busch, PDM, Lexinet Corp. & Jennifer Campbell, Vice President, Integrity Marketing Solutions** — Which is the best media choice for marketing your practice? Website? Newsletters? Direct Mail? Newspaper Advertising? Email Newsletters? Yellow Pages? Online Directories? The choices are myriad, yet there is no single “silver bullet.” This session shows you the strengths and weaknesses of each and how to integrate media for maximum results.

**3:45 to 5 p.m. — Beyond Lead Generation:  
Turning Leads Into Relationships**

**Jennifer Campbell** — Lead Generation is a lot like internet dating: a clever profile may generate lots of inquiries ... but you'll need more than a glamour shot to turn any of them into a relationship! So it is with your marketing efforts. In this session you will learn how to implement processes and protocols in your practice to systematically qualify leads and focus your efforts on building quality relationships that result in profitable business and abundant referrals.

## Day Two - Friday, April 25 Marketing to Business Owners



**8:30 to 9 a.m. — Q&A from Day One, General Housekeeping, & Introduction of Day Two**

**9 to 10:15 a.m. — Marketing to Business Owners**

**Jennifer Campbell & Kyle Krull** — Business owners face a number of unique and frequently vexing estate planning challenges, to include estate equalization, business succession, asset protection, and business continuation. Prime candidates for the “*Millionaire Next Door*” title, they represent a highly lucrative marketing opportunity ... but reaching them requires a creative strategy. Typical *consumer*

strategies will never attract the busy, bottom-line-oriented, success-driven business owner. With corporate dollars often available to solve their unique challenges, you can't afford to miss this market, or this session of the workshop!

**10:15 to 10:30 a.m. — Break**

**10:30 to 11:45 a.m. — Direct Mail Marketing Success**

**Scott Busch, PDM** — A properly-executed direct-mail marketing campaign can open the floodgates to new business clients. But a poorly-executed campaign will simply drain your pocketbook. There are many more ways to fail in direct-mail than there are to succeed. As one of the country's premiere direct-mail gurus, Scott shows you how to avoid the all-too-common failures and use direct-mail to effectively reach your target market and boost your bottom line!

**11:45 a.m. to 1:15 p.m. — Lunch on Your Own**

**1:15 to 2:30 p.m. — Reaching Highly-Compensated Employees, Corporate Officers & Shareholders**

**Kyle Krull, J.D., CFP®** — Not every successful business person is a business owner. Many are highly-compensated employees, corporate officers and shareholders. Though they share many of the same marketing challenges as business

owners (they tend to be very busy, hard to catch, relatively sophisticated, demanding consumers and bottom-line oriented) your methods and messages must change to meet their needs. Learn how to tweak your marketing efforts to prosper in this largely un-tapped market.

**2:30 to 3:30 p.m. — Keys to Working in Collaboration: Teaching, Training & Teambuilding**

**Jennifer Campbell & Kyle Krull** — For an alliance of allied professionals to work well, each professional must be equipped to identify and address client goals.

Keys to success in this process include:

- Initial and ongoing coaching to equip each allied professional to identify and address client needs, dreams and goals;
- Regular communication, including face-to-face meetings on a regular and frequent basis; and
- Joint marketing efforts.

Learn how to work successfully in collaboration through teaching, training and teambuilding efforts and utilizing the principles of "Lifecycle Planning," to help clients uncover their evolving needs, dreams and goals as life progresses.

**3:30 to 4:00 p.m. — Wrap Up, Q&A & Adjourn**



### About Integrity Marketing Solutions

Integrity Marketing Solutions is a marketing and practice development firm serving estate planning professionals since 1995. With more than 200 client firms across the country, and nearly 500 participants in their online discussion forum, Integrity Marketing brings the collective experience of the best practices of successful firms in large, medium and small markets.

### About Our Faculty



**Scott Busch, PDM, Lexinet Corp.** — Scott began his career as an account executive for Dunn & Bradstreet's Marketing Division. Later he served as head of the Direct Marketing division at Barkley Advertising; launched the commercial division at Summit Marketing; and was sales director for Words & Data. He spent ten years with J. Schmid & Associates reviewing spread-sheets, circulation plans, forecasting P&L's, response reports, break-even projections, merchandise distribution figures and contributing to feasibility studies.

He was an adjunct professor at the University of Kansas, teaching "Integrated Media." He is a past-president of Kansas City Direct Marketing Association (KCDMA) and was recently honored by the KCDMA as Direct Marketer of the Year. He is a graduate of the University of Kansas School of Journalism and has completed his Professional Direct Marketing Certification (PDM) from the University of Missouri.



**Jennifer Campbell, VP/CEO, Integrity Marketing Solutions** — Jennifer is Vice President and CEO of Integrity Marketing Solutions. Jennifer has more than 30 years of experience in professional services marketing. She is a frequent speaker on marketing and practice development. She has spoken to a variety of groups, including the Washington DC Bar Association, a number of WealthCounsel forums, recent bootcamps for InterActive Legal, and the Southern California Tax & Estate Planning Forum. She also has written for and been quoted in national publications, including *Trusts & Estates* magazine & *Lawyers' Weekly USA*.



**Kyle E. Krull, J.D., CFP®, President, Integrity Marketing Solutions** — Kyle Krull is the president of Integrity Marketing Solutions, and also president of the Law Offices of Kyle E. Krull, P.A., a trusts & estates law firm. He serves on the editorial review board for the *Journal of Financial Planning* and has written for and been quoted in a number of industry publications, including *Trusts & Estates* magazine, *The National Law Journal*, *Lawyer's Weekly USA*, *Broker World*, *Kiplinger's Personal Finance*, *Kiplinger's Retirement Report*, *Wealth and Retirement Planner*, *Bankrate.com*, *The Business Journal of Kansas City* and *Ingram's*. Kyle has provided continuing education instruction to fellow attorneys, accountants and financial professionals at local, state and national programs.

## Registration Fee - \$795

### Early Registration: \$695 before March 15

Bring an allied professional colleague and one of you comes for FREE  
(or share the registration and each pay half if you prefer).

Register Online at  
[www.estateplanningpartners.com](http://www.estateplanningpartners.com)

Reserve your space now.

Refund Policy: Refunds granted on cancellations before March 15th;  
no refunds on cancellations after March 15th.

## ACCOMMODATIONS

For reservations, call the hotel directly: 816-756-1720

The Embassy Suites Kansas City - Plaza hotel is walking distance from Historic Westport, the beautiful Country Club Plaza and the prestigious Nelson - Atkins Museum of Art. This full-service upscale all-suite hotel is just minutes from Science City at Union Station, Downtown Kansas City, the Kansas City Zoo, Crown Center, Kemper Arena, Bartle Hall Convention Center, Kauffman Stadium - home of the Kansas City Royals, Arrowhead Stadium - home of the Kansas City Chiefs and the Harry S. Truman Presidential Museum & Library. The Kansas City International Airport, Worlds of Fun/Oceans of Fun, the Kansas Speedway, the Woodlands Racetrack and Kansas City's Nebraska Furniture Mart & Cabelas are all just a short drive away. Guests of the Embassy Suites Kansas City - Plaza hotel stay in spacious two-room suites and receive a complimentary cooked-to-order breakfast and a nightly manager's reception. High-speed internet access is available throughout the hotel. The hotel offers complimentary parking for hotel guests and a complimentary shuttle service within a two-mile radius of the hotel.

Integrity Marketing Solutions  
7111 W. 151st St., Ste. 216  
Overland Park, KS 66223

SAVE HALF OFF REGISTRATION &  
BUILD STRONGER REFERRAL ALLIANCES!  
Bring an allied professional colleague and one  
of you comes for FREE -- or share the  
registration and each pay half if you prefer.  
Questions? Call us 1-877-352-2021



### Some of What You Will Learn at this Groundbreaking Workshop:

- **Harness the Power of Collaboration** to build profitable relationships, reach new markets and better serve clients. Learn how to establish and manage key relationships for effective -- and profitable -- collaboration.
- Get **EVEN MORE** from this workshop by bringing your favorite allied professional. We'll invest in your success by giving you **one FREE registration** when you do!
- **Channel Your Marketing Dollars for Greater Return:** Which is the best media choice for marketing your practice? Learn the strengths and weaknesses of each and how to integrate media for maximum results.
- **Building Brand Equity:** How important is "brand equity?" Learn why this may be the single most powerful marketing strategy you can implement now.
- **Beyond Lead Generation: Turning Leads Into Relationships.** Capitalize on the lead-generation process with powerful marketing strategies that turn leads into relationships ... referrals ... and long-term revenue.
- **Direct-Mail Marketing Success:** There are more ways to fail in direct-mail marketing than there are to succeed. Learn the keys to avoid failure and ensure profitable success!
- **Break Into the Lucrative Business Owner Market:** Serve business owners, their families, and their employees, with our trademark **Estate Planning at Work™** strategies.
- **Reaching Highly-Compensated Employees, Corporate Officers & Shareholders:** Learn how to tweak your marketing efforts to reach this largely untapped, lucrative market.

### What Others Say About Marketing with Integrity Workshops

*"The most practical workshop, with the most ready-to-put-to-work information I have attended. Superb in every respect."*

*"I found the course to be both valuable and practical. I will be able to immediately implement the ideas into my estate planning practice."*

*"Everything Jennifer and Kyle have suggested to me has worked. This session was just as good as all else I have received or attended from Integrity Marketing Solutions. Thanks again."*

*"This is exactly what I need. I don't know of any other place that I can get information on how to track my efforts to get the clients I want and how to figure out if what I'm doing is getting me the results I want."*

*"Jennifer & Kyle are the best source of practical advice I have found. They are open, sharing and force me to be brutally honest with myself."*