



Marketing Mastery Series

Estate Planning



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INTRODUCTION

In the swiftly evolving world of estate planning, attorneys are not just drafting documents; they're crafting legacies. As online DIY legal platforms like LegalZoom and RocketLawyer carve out a significant chunk of the market with their quick-fix solutions, the role of a traditional estate planning attorney becomes even more critical. These platforms may cater to the masses with basic templates, but they lack the personalized touch and deep legal acumen that clients truly need when planning for the future. This shift presents both a challenge and a golden opportunity for estate attorneys to emphasize the unparalleled value of tailored, expert advice that goes beyond mere document preparation.

Recent studies, such as Caring.com's [2024 Wills and Estate Planning Survey](#), reveal a decline in the number of Americans with a will, highlighting a significant opportunity for estate planning attorneys to educate and engage potential clients. The survey indicates a 6% decrease in will ownership compared to the previous year, with only 32% of Americans having a will in 2024. Estate planning among Black Americans has increased by 19% since 2020, presenting a growing market segment.

In this guide, we dive into innovative ways to navigate these challenges and seize the opportunities they present. By integrating a mix of traditional expertise and modern marketing savvy, you can connect with a broader audience, educating and empowering them to make informed decisions.

01

Why Implement a Marketing Strategy For Estate Planning Attorneys?

Estate planning attorneys operate in a competitive market where attracting clients is challenging. A strategic marketing approach is crucial for growth, differentiating your firm, and effectively competing against established firms, DIY options, and the financial industry.



1 Beating out the old guard

Long-standing estate planning firms often have a loyal client base and a well-established reputation in the community. These firms may have deep roots and connections within the local legal and business networks, making it harder for new entrants to gain a foothold. Newer firms must stand out against established ones with loyal clients and a community reputation. Innovating services, embracing technology, and targeting niche markets can help new firms attract clients seeking fresh perspectives.

2 Competing against do-it-yourself (DIY) options

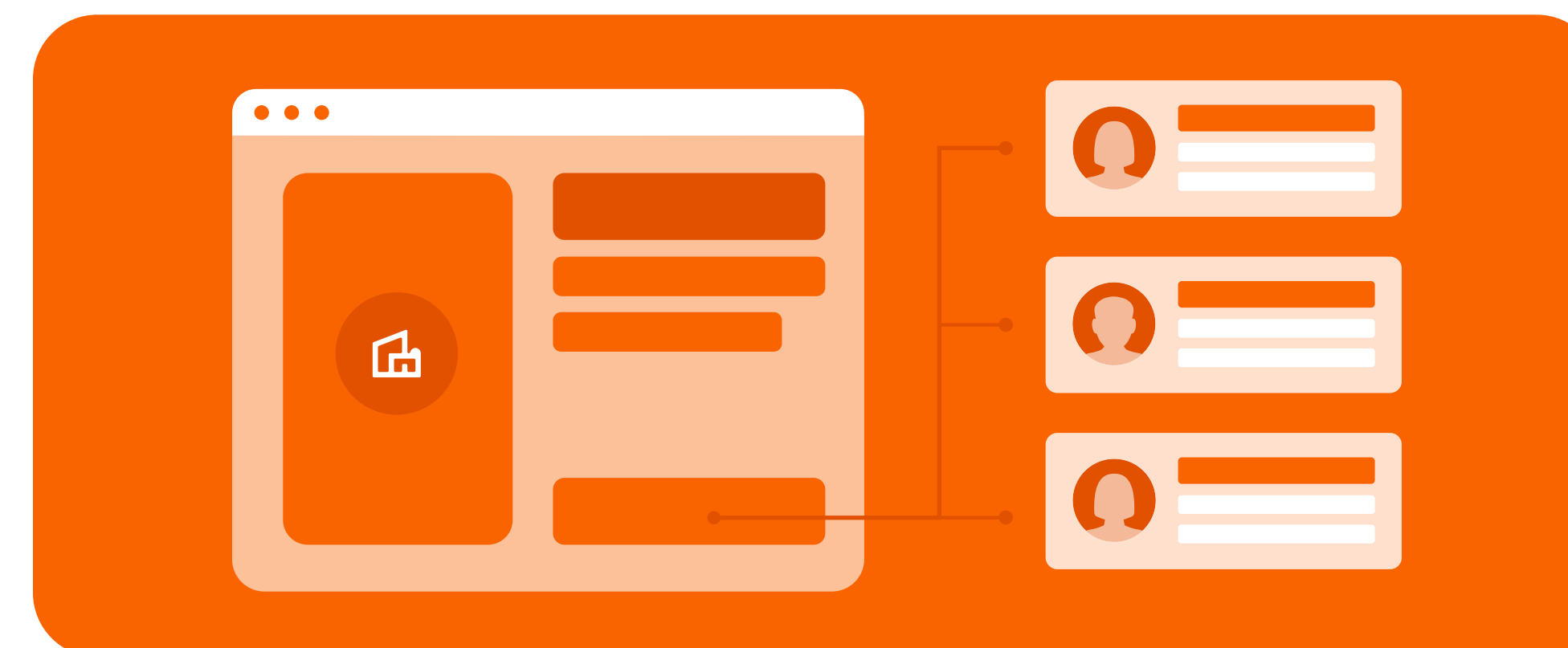
The rise of online legal services has made DIY estate planning more accessible. Attorneys must highlight the value of personalized advice and the risks of DIY solutions. Estate planning firms could consider offering tiered services or unbundled options to cater to clients with varying needs and budgets. Providing a range of options, from basic document reviews to full-service estate planning packages, firms may attract a broader client base while still emphasizing the value of personalized legal advice.

Read more: [What Clients Look for in an Estate Planning Attorney](#)

3 Competing with financial industry

Financial institutions, such as banks and wealth management firms, have recognized the opportunity to offer estate planning services as part of their comprehensive financial planning packages. These institutions often have a client base and can leverage their relationships to cross-sell estate planning services.

Attorneys should emphasize their legal expertise and the importance of a legal perspective in estate planning. Collaborating with financial professionals, such as financial advisors and accountants, can help estate planning attorneys tap into new referral sources and provide a more holistic approach to client service.





02 Key Elements of a Successful Estate Planning Marketing Plan

A strategic marketing plan can enhance your firm's visibility and establish your expertise, attracting clients who seek reliable estate planning attorneys. Navigating the challenges of marketing sensitive topics like estate planning requires professionalism and empathy to connect with potential clients effectively.

1 Develop a strong brand identity

Objective: Position your firm as the go-to resource for estate planning services.

Create a unique brand message that reflects your values and expertise. Ensure consistent communication across all channels and design a visual identity that builds brand recognition. A cohesive brand identity positions your firm as a trusted resource in the market.

2 Invest in digital marketing

Objective: Increase visibility and attract qualified leads.

Optimize your website for search engines and develop a content marketing strategy that positions your firm as a thought leader. Utilize social media to engage with your audience and drive traffic to your website. Targeted advertising can also help reach potential clients actively seeking estate planning services.

3 Engage and educate clients

Objective: Establish long-term relationships and encourage referrals.

Implement a client engagement strategy that includes regular communication through newsletters and educational events. Keeping clients informed and educated fosters trust and loyalty, leading to increased referrals and repeat business.

4 Showcase expertise and build credibility

Objective: Build credibility and establish your firm as a trusted authority.

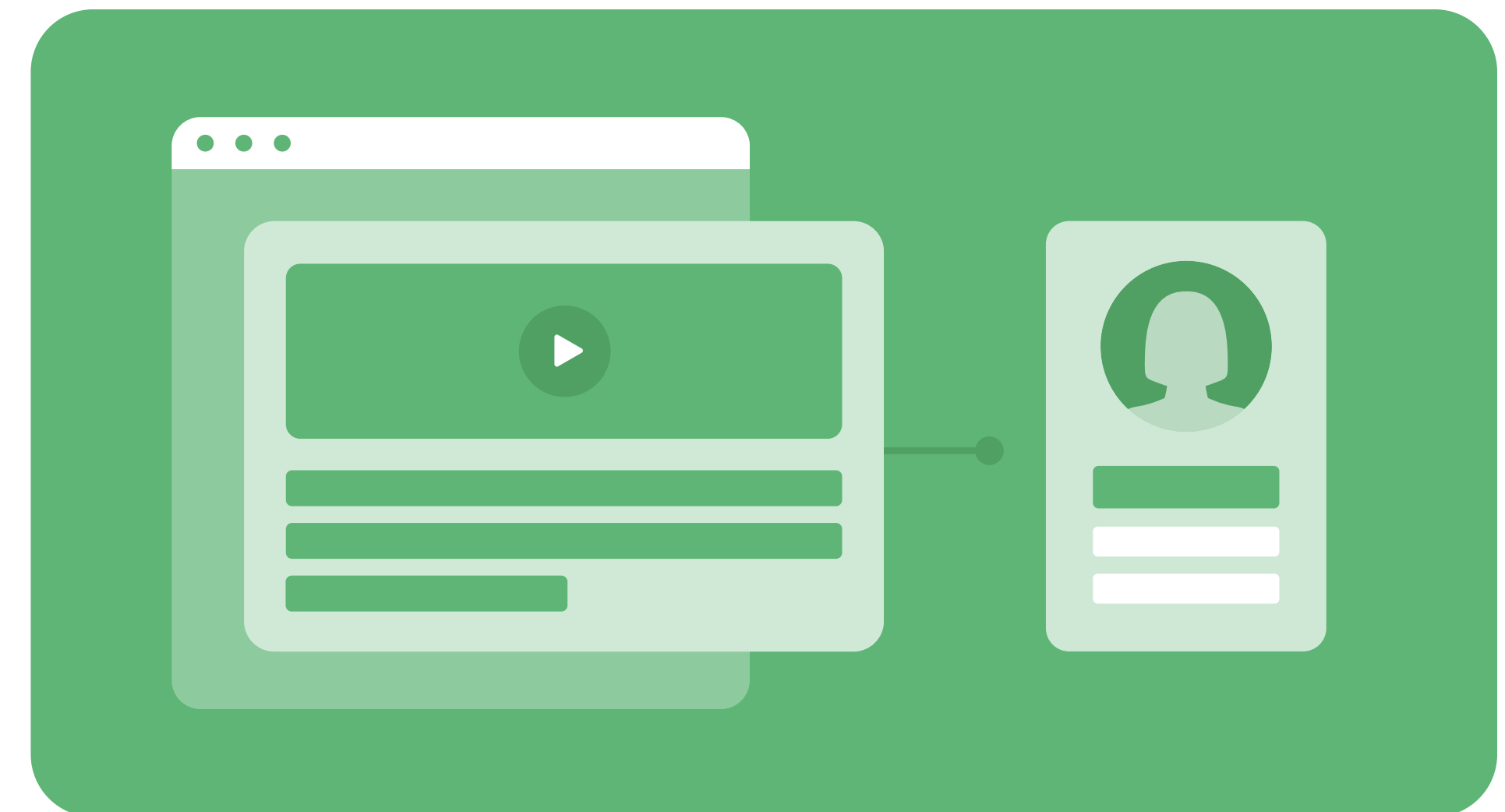
Create content that addresses common estate planning questions and concerns. Leverage client testimonials and case studies to provide social proof. Contributing to industry publications and speaking at events further establishes your credibility.

5

Measure and refine your marketing efforts

Objective: Maximize effectiveness and ensure continuous growth.

Set measurable goals and track progress using key performance indicators. Regularly analyze data to optimize your marketing efforts and stay informed about industry trends. Adapting your marketing plan ensures you meet the evolving needs of your target audience.



03 Foundations of Marketing for Estate Planning Law Firms

A well-crafted marketing strategy can help you attract new clients, expand your client base, and grow your estate planning law firm.

Track your leads with call tracking

Call tracking is a valuable tool that estate planning law firms can use to track the success of their marketing campaigns. By monitoring the number of calls generated by a campaign, your estate planning law firm can measure the effectiveness of your marketing efforts. Call tracking allows you to determine the source of each call, whether it's from a specific ad, website, or other marketing channel. This information can help you identify which marketing strategies generate the most leads and adjust your efforts accordingly.

Use a [call tracking service](#) that offers local or toll-free number options, call recording, and detailed reporting. Look for a service that integrates with your existing analytics tools, such as Google Analytics, to provide a comprehensive view of your marketing performance. With call tracking, you can optimize your marketing spend, improve your ROI, and ultimately grow your estate planning practice.

How Keyword-Level Call Tracking Works



A potential customer searches online and clicks on your ad



A unique phone number is listed on your ad's landing page for the customer to call



The call rings through to your business



The keyword(s), campaign, call duration, etc. are tracked by the unique number and are instantly available to help optimize your Pay-Per-Click campaigns

Source: [Call-tracking - seo-marketing-help.com](#)



Use a CRM to manage relationships

Investing in a [customer relationship management](#) (CRM) system is crucial for efficiently managing your estate planning firm's leads and clients. A well-integrated CRM supports your marketing efforts by centralizing critical client details, such as assets, liabilities, and estate information. Use this data to tailor your marketing campaigns and personalize your approach, improving client engagement and retention.

Check out: [Calgary Estate Planning Law Firm Achieves 70% Client Retention Rate Using Lawmatics](#)

To further enhance client service and operational efficiency, consider pairing your CRM with an answering service.

Key benefits of integrating a CRM with an answering service

1. **Seamless lead capture.** Ensure that your answering service captures all relevant information from potential clients and feeds it directly into your CRM for prompt follow-up.
2. **Consistent client communication.** Log all client interactions in your CRM, providing a unified and informed approach to communication across your firm.
3. **Efficient appointment scheduling.** Leverage the integration to schedule consultations directly in the CRM's calendar, avoiding double bookings and ensuring meeting preparedness.
4. **Improved responsiveness.** With 24/7 call handling and real-time data entry into the CRM, your firm can quickly respond to client needs with up-to-date information.
5. **Enhanced organization and task management.** Utilize the CRM to assign follow-up tasks and reminders, ensuring that important steps are not overlooked.
6. **Data-driven insights.** Regularly analyze the data in your CRM to identify trends and insights that can inform your marketing strategies, website content, and staff training.

Use team feedback, along with the data insights, to continuously refine your processes and strategies. By doing so, you create a dynamic system that captures leads, enhances client service, and drives steady growth for your estate planning practice.



Learn more on this podcast episode: [An Inside Look At The Lawmatics Platform With CEO Matt Spiegel](#) - Everything Except the Law Podcast, Episode 33

Nurture leads with email campaigns

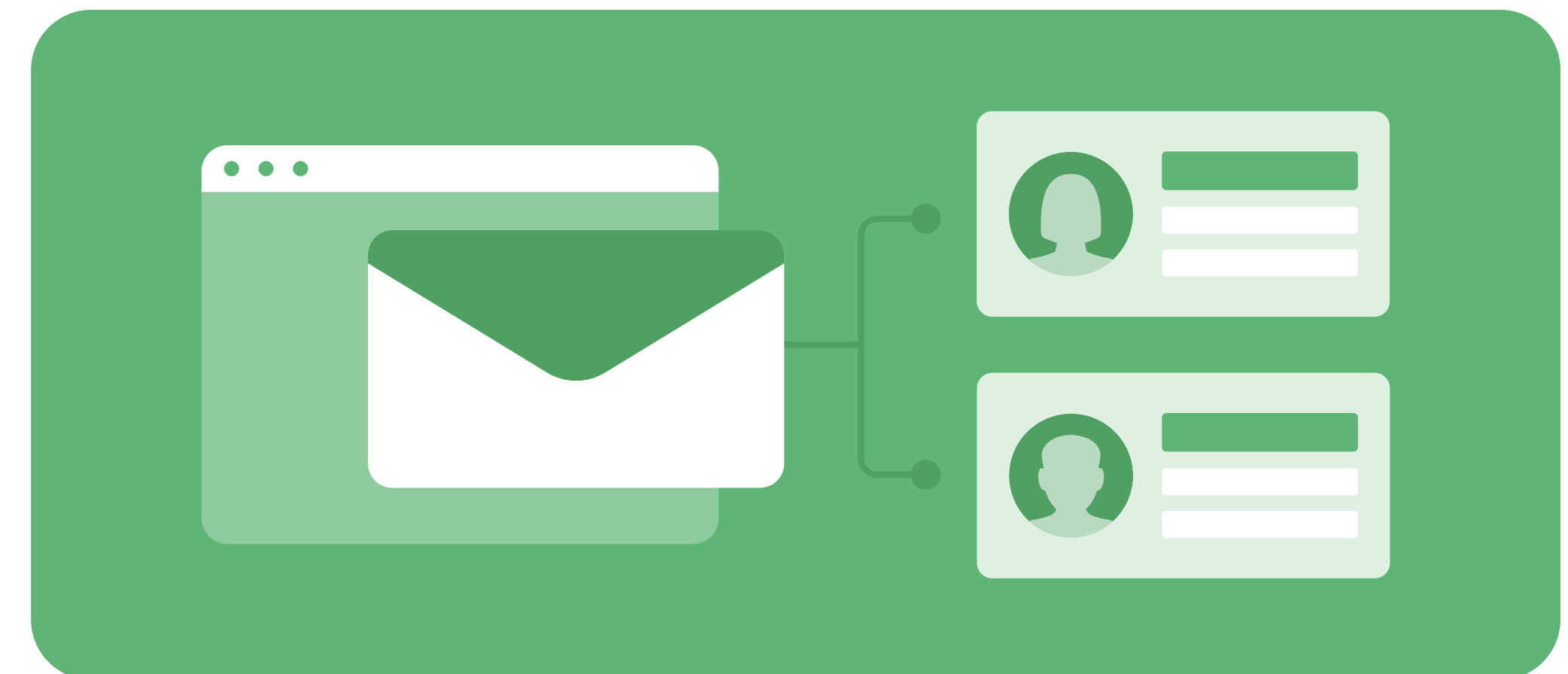
Email nurture campaigns are a fantastic way to engage potential estate planning clients. Think of sending targeted emails that gently nudge them towards becoming clients. For instance, a simple birthday email campaign can delight and remind potential clients of your services.

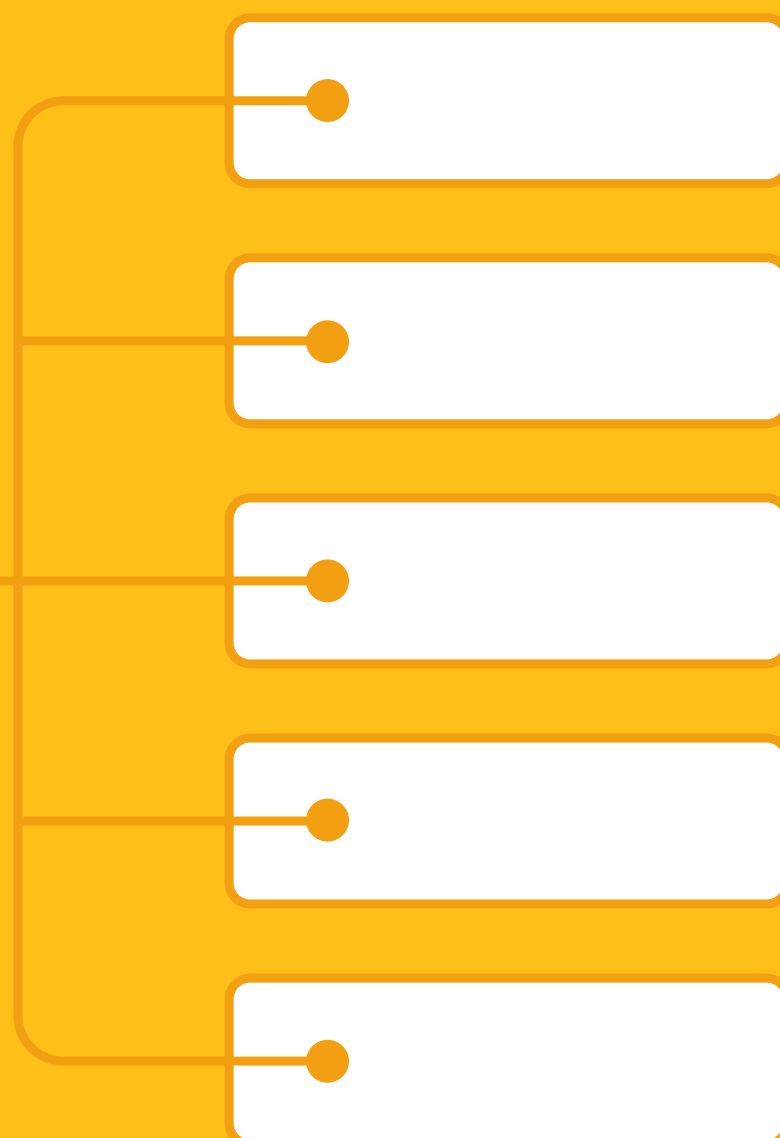
Here are some quick, actionable ideas you can implement through your CRM for proactive client outreach at key moments:

- **Annual plan review reminders.** Automate annual reminders for clients to review and update their estate plans due to life changes such as marriages, divorces, or significant asset changes.
- **Birthday greetings with plan review prompt.** Send automated [birthday](#) wishes and a gentle nudge to consider updating your estate plan.
- **Legislative update notifications.** Automatically inform clients about changes in estate planning laws in their state and how they might affect their plans.
- **Life event follow-ups.** Set up a series of automated follow-ups after major life events like marriage or retirement to check if their estate plan needs an update.
- **Long-term care planning outreach.** As clients near retirement age, send educational emails about long-term care planning and its importance in their estate plans.

- **Beneficiary review reminders.** Periodically remind clients to review and update beneficiary designations on their retirement accounts and insurance policies.
- **Client appreciation and referral requests.** Express gratitude at significant milestones (e.g., one year after plan creation) and gently ask for referrals.
- **Educational content series for client's family.** Offer to send educational emails explaining the estate plan's key aspects to clients' family members.

By automating these communications, you provide ongoing value, encourage timely plan updates, and remain top-of-mind with clients and their families. This approach nurtures strong long-term relationships and can organically drive new business to your practice.





04 5 Channels to Market Your Estate Planning Firm

Estate planning law firms have a unique opportunity to market their services in various ways. Networking, Google Business Profile, content marketing, social media, and paid advertising are five effective methods that estate planning law firms can use to reach more clients and grow their business.

Estate planning law firms should create a marketing plan that encompasses all of these strategies based on your goals, budget, and target audience.

1 Referrals, online directories, and local involvement

Start your marketing strategy by leaning on and growing your network. You can't just sit and wait for clients to come to you. You need to be proactive and generate leads by getting the word out about your law firm.

Read more: [Referral Marketing for Attorneys: A Beginner's Guide](#)

Referrals and networking

Start your marketing efforts by tapping into your network and community.

One of the best ways to market your estate planning firm is to receive referrals from other professionals. Financial advisers, accountants, insurance agents, and other attorneys are all potential sources of referrals for estate planning law firms.





Watch: [How Small Businesses Can Get Involved with Their Community: 7 Ideas for SMBs](#) – KORONA POS

Get involved in local events

Attending and sponsoring local events allows estate planning law firms to gain exposure and build relationships with the community. Consider sponsoring a fun run or 5K that donates to cancer research, a local choir, theater, or museum, or buy a little league's baseball shirts.

You show that you care and are committed to the community. Sponsoring local events is also a great way to get [backlinks to your law firm website](#).

When another website links to your estate planning law firm's website, it is called a backlink. This strongly indicates to Google that your website is an authority on the topic and should be ranked. Backlinks are essential to SEO, and estate planning law firms should take advantage of them to improve their website's ranking.

Online directories

One of the most effective ways to market your estate planning firm is by listing your firm in online directories. Online directories are websites that allow businesses to list their contact information, products, and services.

Some standard legal online directories you should consider are:

- Avvo
- Nolo
- Justia
- Lawyers.com and Lawyer.com (Yes, they are different)
- HG.org
- Martindale-Hubbell

Listing your estate planning firm's online directories can help you reach more clients and grow your business.

What Makes a Legal Directory Great?



High domain rating



Substantial organic keyword rankings



Respected source for legal information

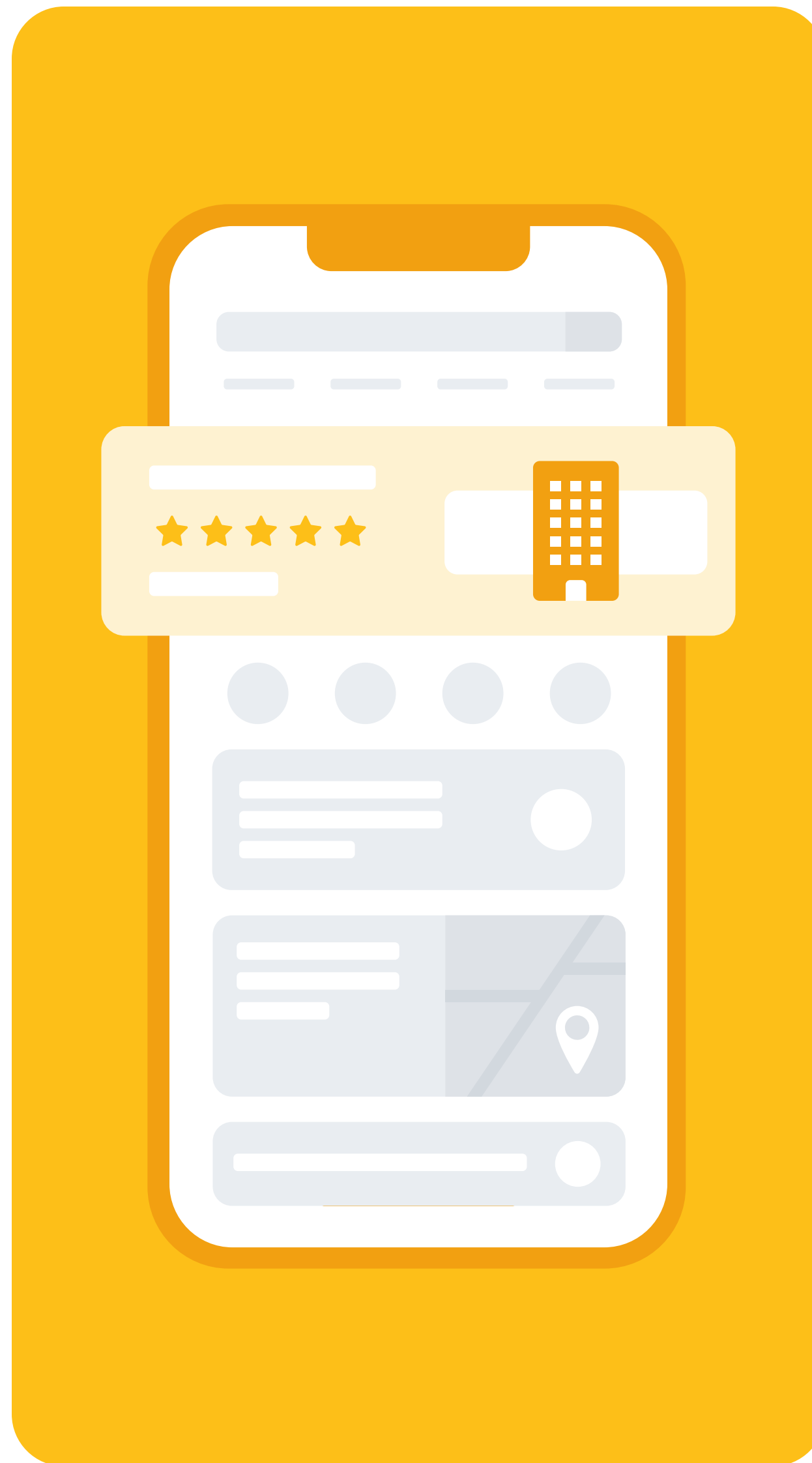


Provides answers to legal questions



Makes it easy to locate local lawyers and law firms

Source: [Top Legal Directories – LawRank.com](#)



2 Google Business Profile (GBP)

While, in a sense, Google Business Profile (formerly Google My Business) is an online directory, it is also the best way to get in front of your community. It allows you to control your estate planning law firm's appearance in search results and Google Maps.

The best part about using Google Business Profile is that it is a free business listing.

Claim & fill out your GBP

Claiming your GBP is the first step in taking control of your estate planning law firm's online presence. To claim your business, you must log in to Google and either claim an existing profile or create a new one. You will need to coordinate with Google to receive a verification code to verify your profile. The default method for obtaining the code is by postcard to the address.

After you have claimed your listing, it is time to fill out your GBP profile. Your GBP profile should include:

- Your business name
- Your contact information (i.e., address, phone, website)
- A description of your estate planning services
- Your hours of operation
- Answer questions

Get the checklist: [How to Optimize a Google Business Profile for Law Firms](#)

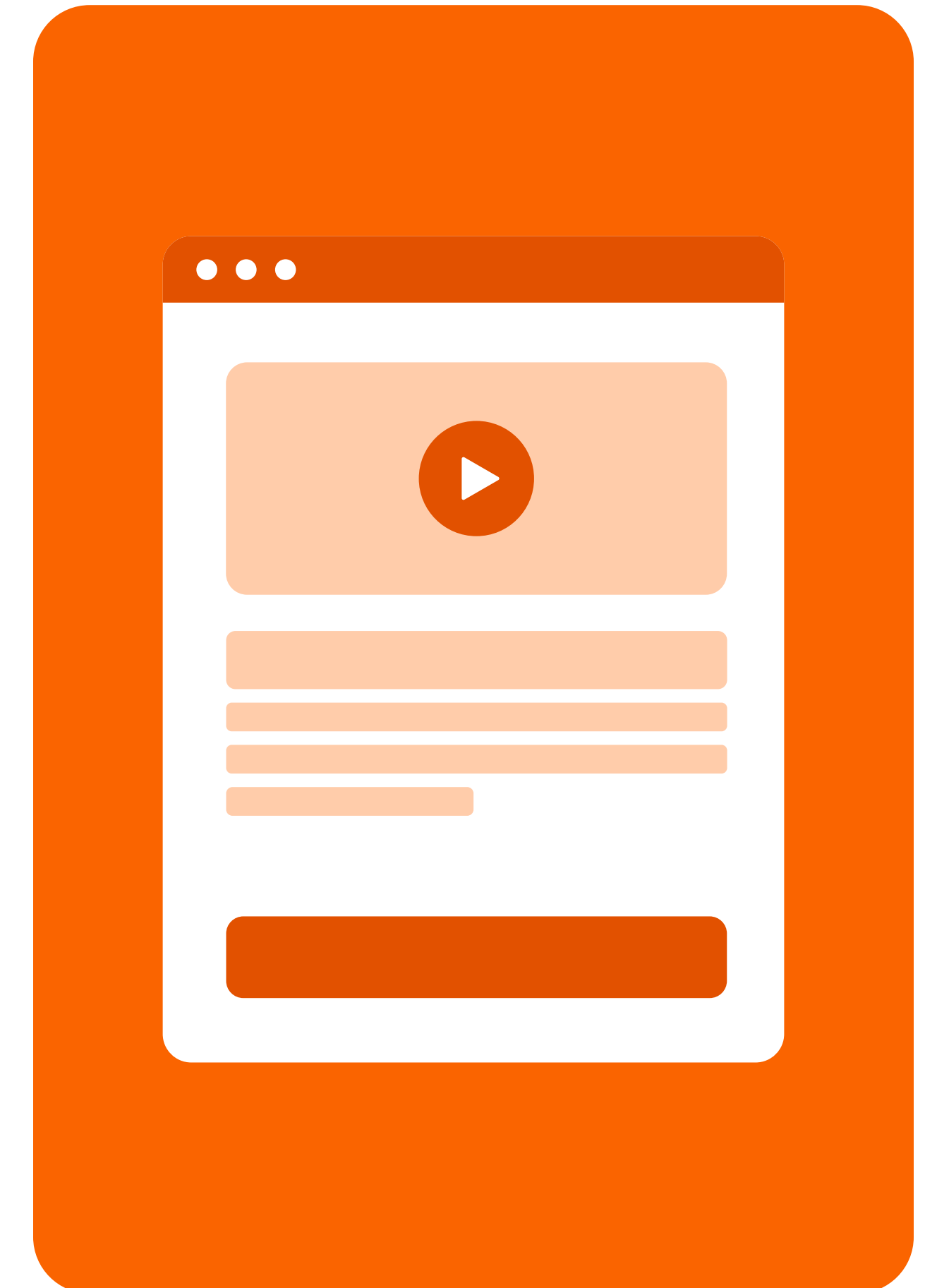
When filling out your Google Business Profile, include keywords that people may use to search for your services in the description.

Leverage Google Business Profile (GBP) as a social media tool

Google Business Profile (GBP) isn't just a directory listing; it's a platform where you can actively engage with potential clients. Posting regularly on GBP can enhance your local authority and provide valuable information to your community.

Here are 10 tips for effective GBP posts, adapted from [A Guide to Google Business Profile Posts](#):

- 1. Diverse content.** Create a mix of update, offer, and event posts to highlight your law firm's expertise, promotions, and events.
- 2. Visual appeal.** Use high-quality images (720px by 720px) and short videos (up to 30 seconds) to capture attention.
- 3. Concise messaging.** Keep your posts brief (80–100 words) and focused, with a conversational tone that resonates with your audience.
- 4. Clear call to action.** Include a CTA button linking to relevant pages on your website, guiding potential clients to take the next step.
- 5. Track performance.** Use UTM tags to monitor how your posts impact website traffic and conversions.





6. **Consistency.** Aim for regular posting, such as one offer post and one update post every couple of weeks.
7. **Highlight strengths.** Showcase your firm's unique selling points, awards, and client success stories in update posts.
8. **Promotions.** Use offer posts to promote free consultations, guides, or resources that can attract potential clients.
9. **Engage with events.** Share information about upcoming webinars, workshops, or community events in event posts.
10. **Analyze and adapt.** Regularly review GBP Insights and Google Analytics data to refine your posting strategy based on audience engagement.

By incorporating these tips into your GBP strategy, you can effectively use the platform to enhance your law firm's online presence and attract more clients.

Add photos and videos to your GBP listing

Showcase your firm's office, team, and services by adding pictures to your profile. Adding photos allows potential clients to understand you and your firm better.

Take it one step further and get 360-degree photography of your law office — think [Google Street View](#), but indoors. You must work with a Google Trusted Photographer to get 360-degree photos on your Google Business Profile.

3 Optimize your website

Creating and updating content on your website will increase your authority on estate planning in the search results. The more information you provide on your website will help your site appear prominently online.

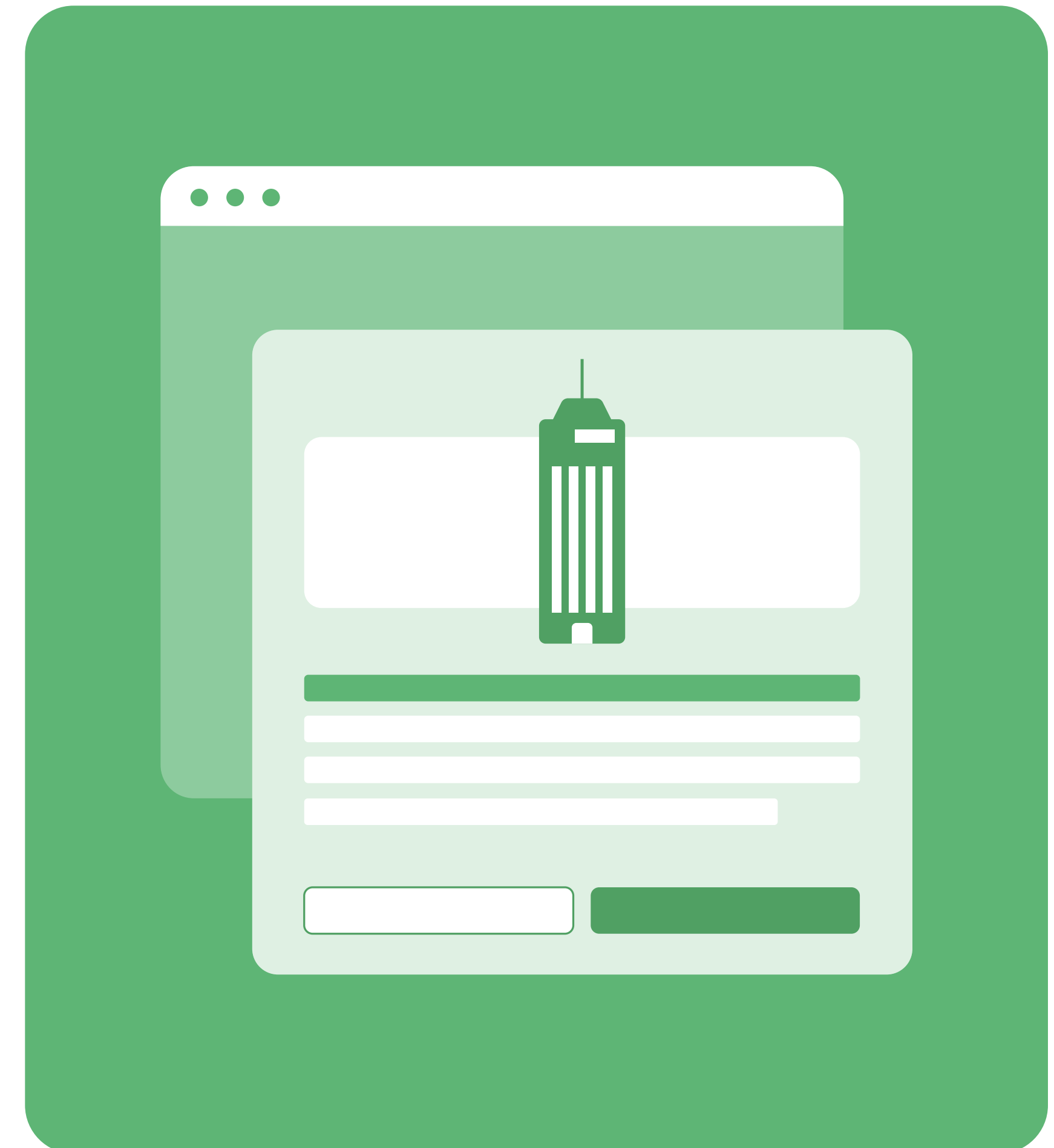
Practice area pages

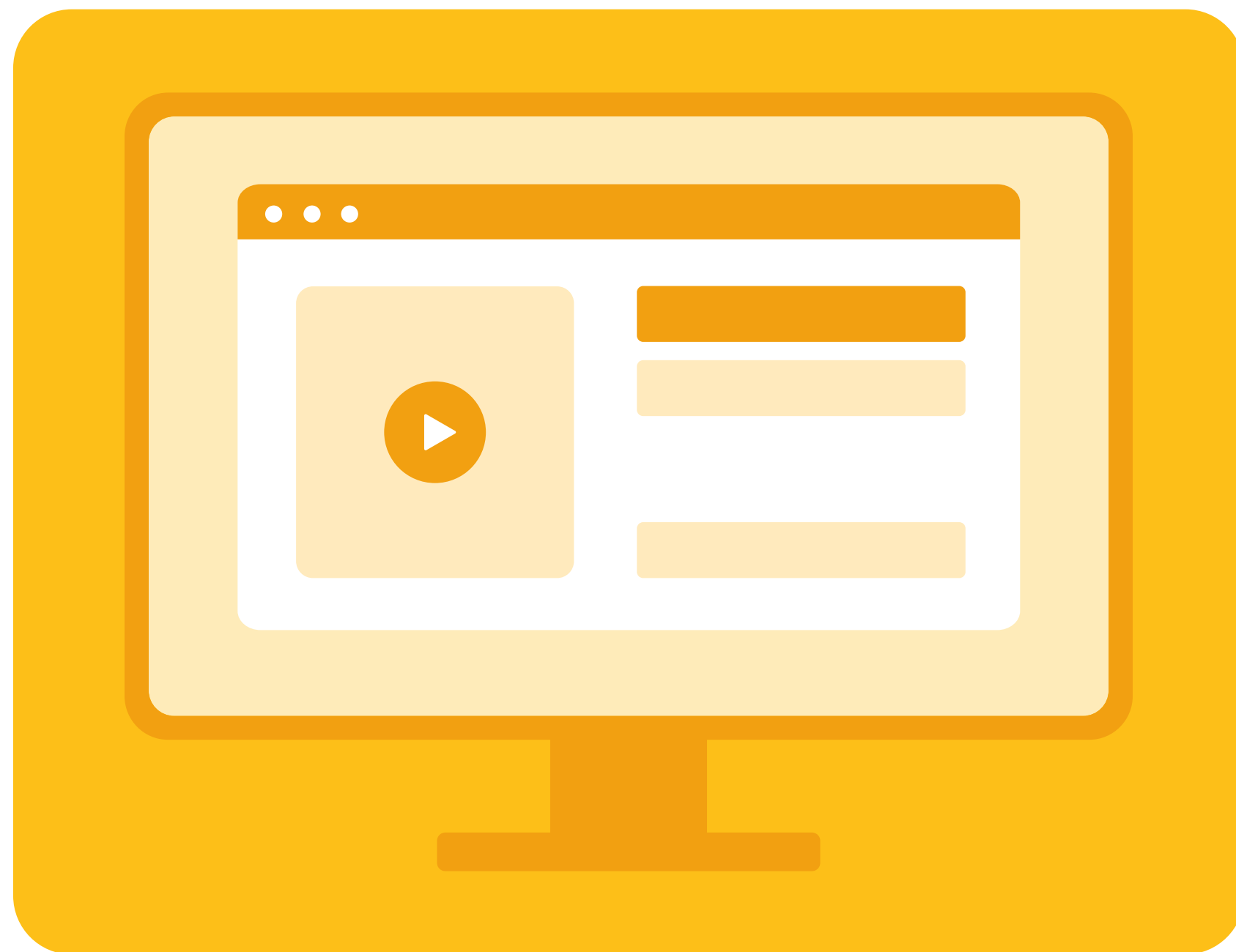
When we talk about web content, we don't only mean blogging. Make sure your website details all of your practice areas. Explain your topic and how you would handle that issue, and end with a call to action (e.g., "Call today for a consultation").

Blogging for busy lawyers

An estate planning firm should consider blogging to keep its website up to date with relevant content. Use your blog to answer questions that your clients ask you over and over again. A blog is a great way to show your expertise on the topic and can also act as a resource for potential clients.

Find out more: [Blogging for Lawyers: How to Start a Legal Blog](#) – Clio





Experiment with other forms of content

Once you've built your website and started blogging as part of your estate planning marketing strategy, you can experiment with different media.

Estate planning can be a complex process, and many people have questions about it. Try filming a video to answer some of the most common questions. This is a great way to show your expertise and help potential clients understand estate planning better.

Check out: [Close More Legal Clients with Video Marketing](#)

You can also create long-form, helpful content like an e-book that people can download. This is a great way to show your expertise and provide potential clients with additional information about estate planning.

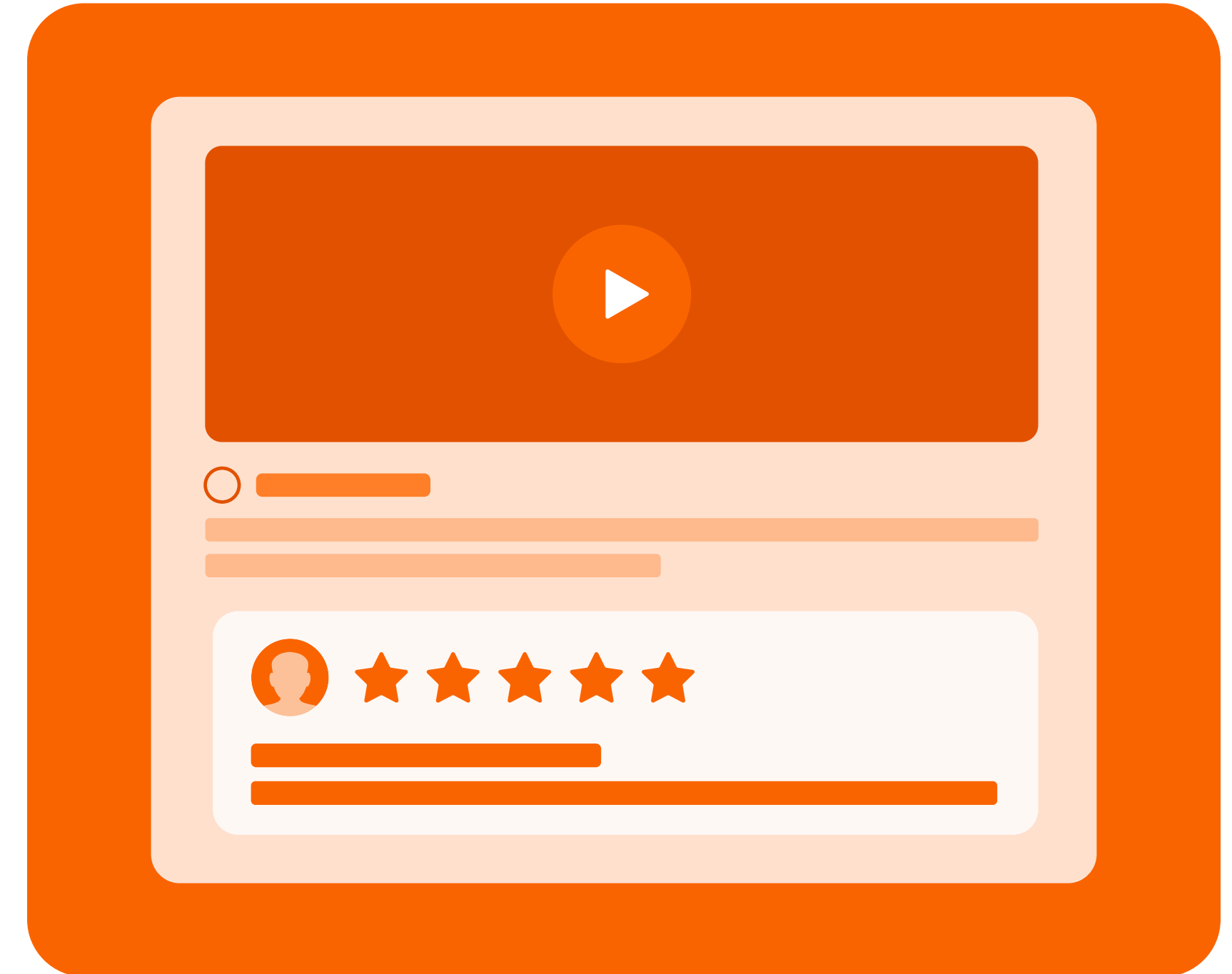
4 Social media and reviews

Estate planning lawyers can use social media to connect with potential clients and build their businesses. Estate planning lawyers can attract new clients and grow their practices by creating interesting, engaging content.

Go where your clients already are

Your prospective clients are online. They are watching videos, reading articles, and checking social media. Social media can be highly effective for keeping in touch with existing clients, reaching new ones, and expanding your referral network. That said, choosing the proper social media channels is important.

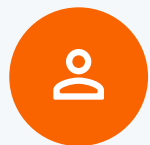
It makes sense for estate planning lawyers to be visible on social media platforms like Facebook and LinkedIn. Lawyers can use these platforms to share blog posts, answer client questions, and connect with potential clients.



2024 Social Media Statistics



5.07 billion social media users around the world in April 2024.



The global average gender split of social media users is **53.6% men and 46.4% women**.



92.7% of internet users are on social media.



An average person spends **2 hours and 20 minutes** per day using social media.



9 in 10 internet users now use social media each month.



The world spends close to **12 billion hours** using social platforms each day.

Most Popular Social Media Networks





LinkedIn, where everybody knows your game

LinkedIn is the most useful channel for estate planners. LinkedIn users are usually more professional, more established, and better educated, so it's only natural to have a presence on this platform.

Like most social platforms, you can use it to share analyses or insights about changes in legislation or other timely news. You can promote your new blog articles, share information about your business, and add videos or images to enhance your posts.

Regular posts will help you establish yourself as an estate-planning expert and help you reach more potential clients.

Read more: [How to Use LinkedIn to Grow Your Law Practice: An Introduction for Attorneys](#)

Ask your clients for reviews

Online reviews are incredibly important and give social proof to prospective clients. Make it easy for your clients to leave a review by providing them with a link to your online profiles to leave a review.

In an ideal world, every happy client would leave a 5-star review on Google, but sometimes clients are shy about leaving reviews on Google because it will list their name publicly. If your client feels more comfortable leaving a review on LinkedIn, Facebook, or even an online directory like Avvo – encourage them to do so.

Templates: [44 Unique Email Templates for Requesting Online Reviews](#), [Grade.us](#)





Video: [Should You Use Landing Pages or Lead Forms for Paid Media Campaigns?](#) – Paid Media Pros

5 Paid advertising

As with all marketing strategies, you want to strike a balance in your approach. SEO and social strategy require consistency over time. Building strong relationships through networking and community involvement also takes time.

Paying for advertising is a great way to ensure that your company is always at the top of the search results, and it can keep the phones ringing when your firm is in a slump.

Paid advertising campaigns for estate planning attorneys

Law firms can also consider using paid marketing strategies to reach potential estate planning clients. Placing ads in relevant online and offline publications or websites targeting your desired audience can be extremely effective.

Additionally, law firms can use targeted online advertising, such as pay-per-click advertising or display advertising, to reach individuals interested in your services.

Use a dedicated landing page or forms to track and convert leads

If you are investing in paid advertising, you need to take the extra step to include a dedicated landing page for each of your paid campaigns.

If you choose to have your landing page on your website, remove all site navigation so the lead will stay on that page and convert. You can also build out landing pages on platforms that specialize in converting PPC leads.

Your PPC landing page will be specifically designed to capture the contact information of individuals interested in learning more about estate planning services

The advantage of using a landing page is that you can track how many people are visiting the page and how many are filling out the contact form. This data will be extremely valuable as you assess your ROI for your paid campaigns.

Test Google Local Service Ads

Google Local Service Ads is a relatively new advertising platform that allows you to place ads for their services in the local search results. These ads appear as a sponsored listing at the top of the search results and include a call-to-action button that allows potential clients to contact the law firm quickly.

To be eligible to participate in Google Local Service Ads, all of the attorneys at your firm must meet specific requirements, such as being licensed and insured. Additionally, your firm’s attorneys must undergo a background check conducted by Google.

Despite the effort, Google Local Service Ads can be an extremely effective way to reach potential estate planning clients who are searching for estate planning services in your area because you will appear at the top of search results (even above other PPC ads), and Google will have verified you.





FAQ

What are the best places for estate lawyers to have an online presence?

There are several great places estate planning lawyers can have an online presence.

A website is a must-have. Your website should accurately represent your practice and what you provide. Consider a search engine optimization (SEO) strategy to optimize your website so that potential consumers may locate you online with ease.

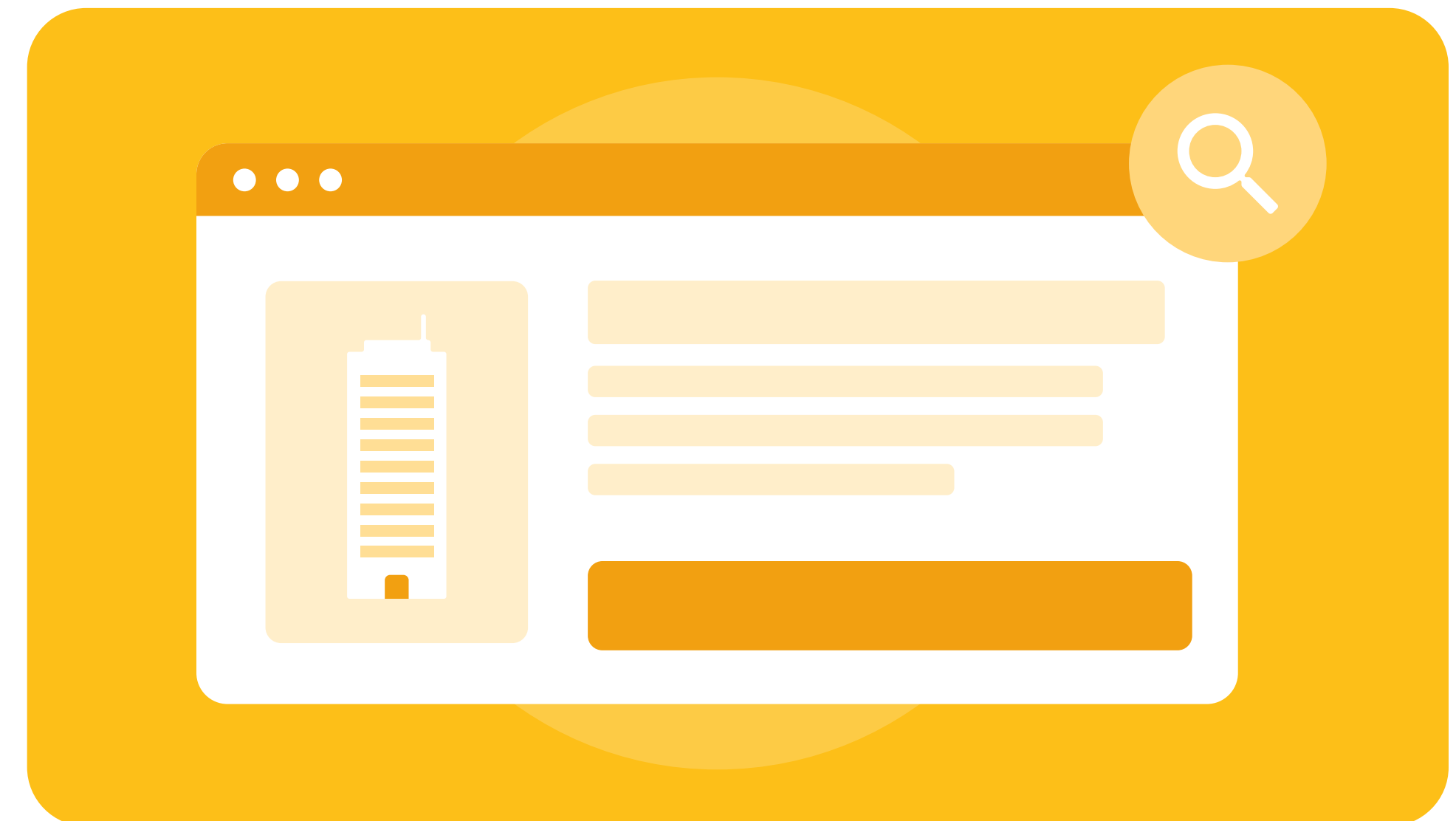
You should also consider social media sites, as they are ideal for establishing connections with potential clients. LinkedIn is a fantastic platform for estate planning professionals to network and develop relationships with new clients.

How can Google attract clients who need help with wills & estate planning?

You can use Google products like Google Business Profile and Google Local Service Ads to get in front of prospective clients.

To start, you need to claim and verify a Google Business Profile listing and optimize it for search engines, making it easier for prospective clients to find you. Once you have your GBP listing, you can write posts related to estate planning.

Google Local Service Ads will display your law firm information at the top of the search results page and push people to call you.



Attract & Convert More Qualified Clients With Lawmatics

Take your firm's marketing from good to great with Lawmatics. Our leading legal CRM and marketing automation platform offers the sharp analytics you need to maximize your marketing ROI and ramp up your profitability. [Request a demo](#) today to find out how!

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