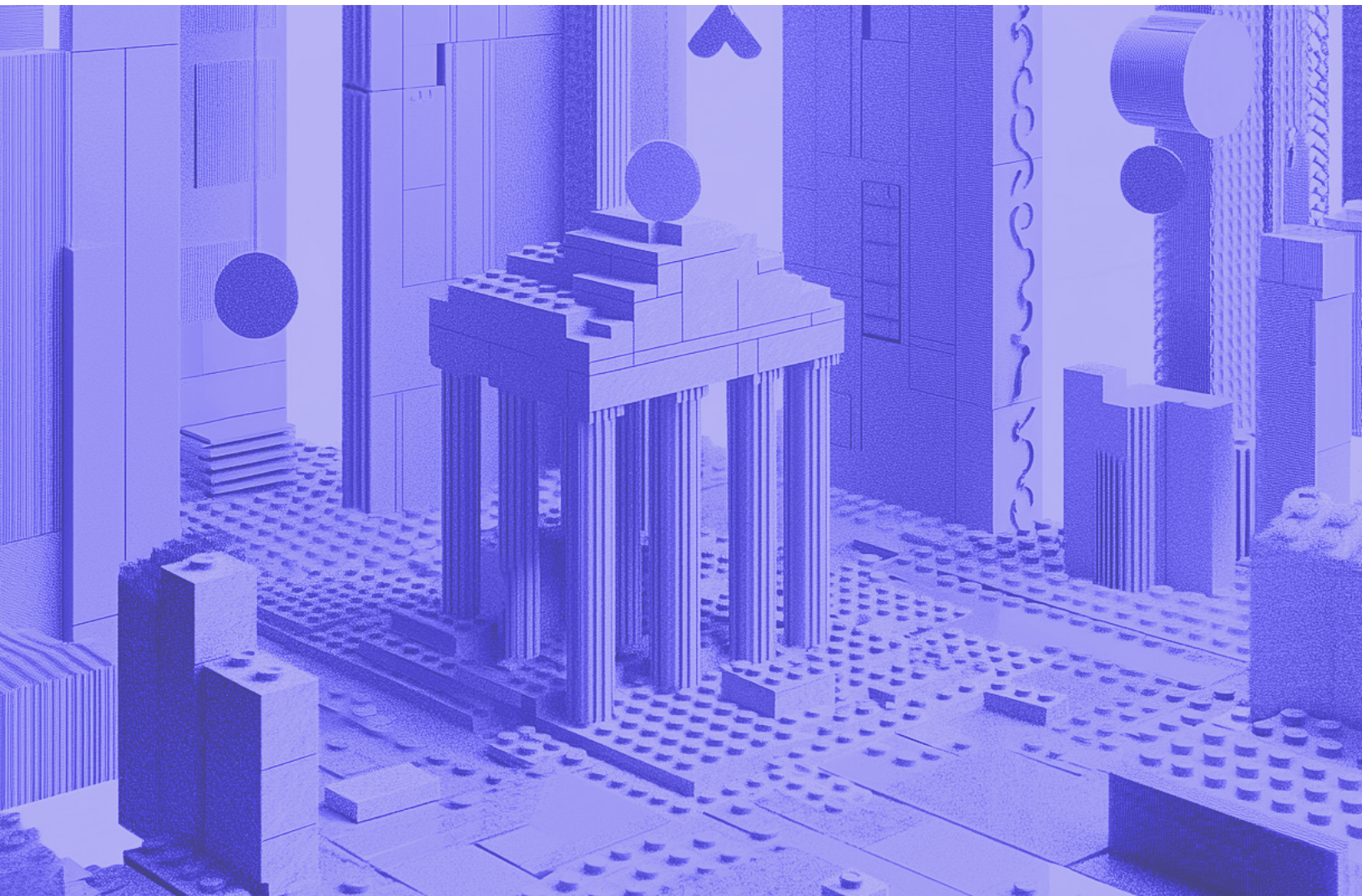


Lead Generation and Prospecting: 3 Ways Estate Planning Tools Help You Win New Business

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Introduction: Estate planning as a growth engine for advisors

Estate planning undoubtedly adds value for your current client base, but many advisors are discovering it can also be used as a powerful lead generation tool, differentiating your firm in a crowded market and helping you attract new prospects.

Vanilla, the leading estate planning platform, has helped advisors increase assets under management by enabling them to offer modern, highly visual estate planning deliverables.

In this guide, we'll break down practical strategies for using an estate planning platform to generate interest, engage new prospects, and close more business. From sample reports to AI-driven insights, you'll find actionable tips on turning these tools into effective lead magnets that grow your firm. Throughout, we'll use Vanilla's features to provide examples, but these strategies can be applied with other platforms as well.

Use sample estate planning reports to attract prospects

Vanilla enables advisors to generate comprehensive, easy-to-understand estate plan reports that wow clients and prospects. These reports compile the client's family information, assets, and estate structures into a clear visual format – a deliverable unlike anything most prospects have seen before.

Showcasing an estate plan in plain English and compelling graphics helps prospects truly grasp their legacy plan, which makes your service memorable. Try these strategies for using Vanilla's sample reports to generate leads:

Offer a sample report download:

Create a lead capture on your website where visitors can download a *sample estate planning report*. Explain that this is an example of the insightful report they'd receive by working with you. Requiring an email address to access the sample turns it into a lead magnet, meaning that interested prospects will trade contact info for a peek at the value you provide.

Use reports in seminars/webinars:

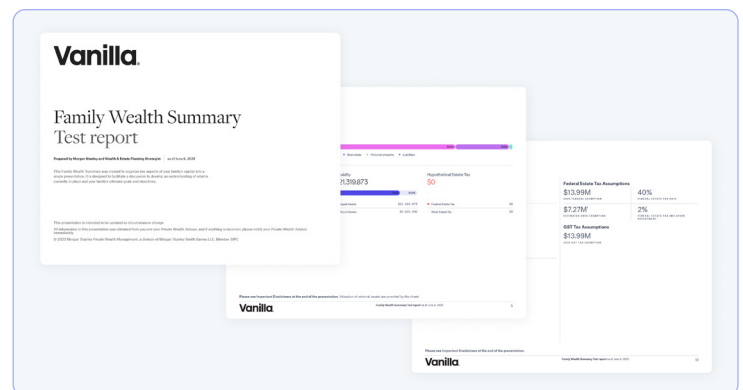
If you host educational seminars (online or in person), incorporate visuals from Vanilla's sample report to show attendees how an estate plan is summarized in diagrams and charts. This tangible example can intrigue attendees to learn more. As part of the seminar, invite them to request their own estate plan review from your firm.

Personalize for prospects:

For high-potential prospects, consider creating a mini estate report using Vanilla with whatever information they can provide. For example, after an initial consultation, input a prospect's basic details into Vanilla to generate a preview report. Presenting a personalized estate snapshot demonstrates the level of insight you offer, increasing the chances they'll convert to a client.

Encourage sharing:

When a client or prospect receives a Vanilla-generated estate report, encourage them to share it with their family. As the report circulates among family or friends, it can spark conversations, turning your happy client into a referral source as others see the work and ask who helped create it.



Visual, client-friendly reports like these can differentiate your services.

Create quick wins with a “planning checkup” through Estate Health Check:

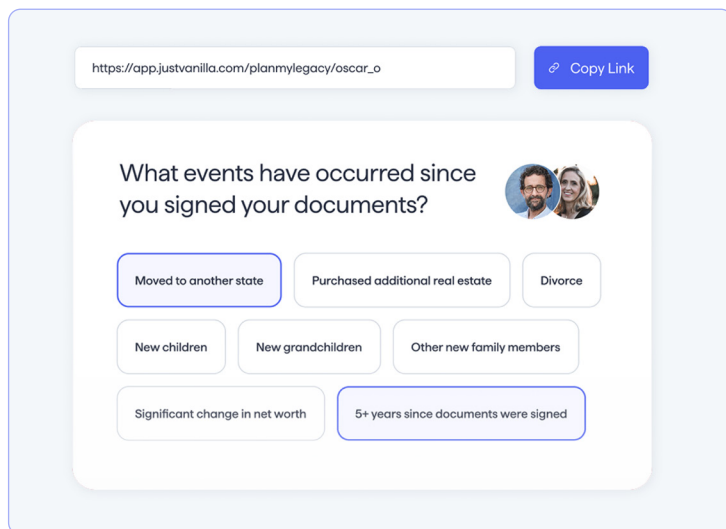
One of Vanilla’s most powerful prospecting tools is the Estate Health Check, a brief, insightful questionnaire that assesses the health of someone’s estate plan.

Think of it as a financial “checkup.” Prospects answer a series of questions about their wills, trusts, assets, and family situation, and the tool produces a personalized report with education and recommended discussion points.

Advisors can leverage this in several ways to generate leads:

“Take the estate health check” call-to-action:

Incorporate a *free Estate Planning Health Check* on your website or digital ads. Vanilla provides advisors with a branded public link to the Health Check, so prospects can access it seamlessly (no account signup required). Promote this link in targeted Facebook or LinkedIn ads (for example, “How healthy is your estate plan? Take our 5-minute Estate Health Check now”). Each completed checkup is a warm lead; you’ll get their results and can follow up.

The image shows a screenshot of the Vanilla Estate Health Check interface. At the top, there is a URL bar with the link "https://app.justvanilla.com/planmylegacy/oscar_o" and a "Copy Link" button. Below this is a question: "What events have occurred since you signed your documents?". To the right of the question is a small circular profile picture of a man and a woman. Below the question are six buttons arranged in two rows. The first row contains "Moved to another state", "Purchased additional real estate", and "Divorce". The second row contains "New children", "New grandchildren", and "Other new family members". At the bottom of the second row are two more buttons: "Significant change in net worth" and "5+ years since documents were signed".

Vanilla’s Estate Health Check uses a simple online questionnaire to gauge a prospect’s estate planning “vital signs.”

Use the results for consultations:

The output from the Health Check includes educational content and flags potential gaps or needs in the prospect’s estate planning. You can use these personalized results as conversation starters. For instance, if the Health Check shows a prospect lacks a healthcare directive, you now have a clear reason to reach out: “I noticed in your Estate Health Check that you might be missing a healthcare directive. Let’s discuss why that’s important and how I can help.” This approach provides immediate value and a natural segue to offering your services.

Webinar lead-in:

Host a webinar or workshop on estate planning basics and invite attendees to complete the Estate Health Check beforehand. This not only boosts engagement during the event, since you can address common issues revealed by the checkup, but it also allows you to collect attendee information and tailor your follow-up. Prospects who see their personal “estate fitness” report will be more eager to hear your guidance during the webinar and afterwards.

Periodic engagement:

Even for existing clients, the Health Check can be used to spur new planning discussions. It can also lead to referrals, as your clients might suggest their friends take the check too. For prospecting, you can consider running an annual digital campaign like “New Year Estate Health Check,” encouraging people to assess their estate plans. The key is that it’s a *low-friction, high-value offer* – a quick checkup – that brings people into your funnel.

Offer “second opinions” at scale with AI-generated estate summaries

V/Al Copilot, Vanilla’s AI-driven estate plan analysis tool, can read a client’s entire set of estate planning documents and instantly produce a structured summary of their estate plan. The AI-powered tech combs through wills, trusts, and legal jargon, and then generates a concise overview: who the beneficiaries are, what each trust does, and where inconsistencies might lie. It even flags issues, like misaligned provisions, along with general next-step recommendations.

For a financial advisor, this game-changing tool enables you to offer prospects a quick, informative estate plan review without hours of manual work. You can put this capability to work generating leads in several ways:

“Free estate plan review” campaign:

Many people with existing estate documents haven’t revisited them in years. Attract these prospects by advertising a *free estate plan check-up powered by AI*. For example, run a digital ad that reads: “Upload your will & trust documents, and get a free AI-generated Estate Summary and second opinion on your plan.” With Vanilla’s V/Al engine doing the heavy lifting, you can efficiently deliver on this promise. Prospects receive a professional one-page summary highlighting key provisions and issues in their plan. It’s a compelling offer to get them in the door.

Uncover planning gaps instantly:

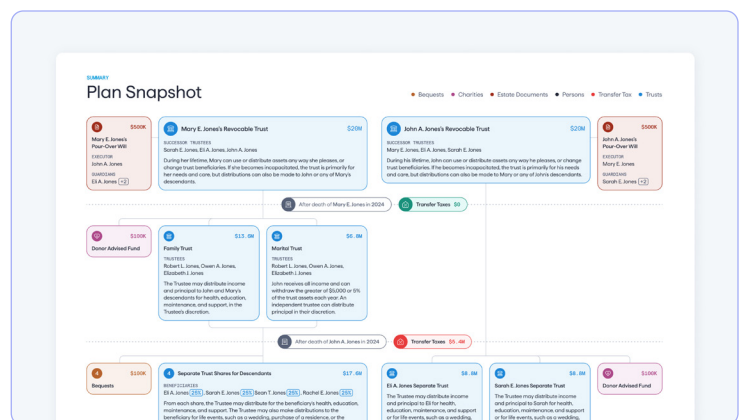
When a prospect provides their existing estate plan, V/Al will analyze it as a whole to identify gaps or inconsistencies (for example, missing contingent beneficiaries or outdated tax clauses). Use these findings to your advantage and highlight the uncovered issues in your follow-up discussion. Explain how you can help address those specific gaps, demonstrating your expertise and showing the prospect tangible areas where you can add value, making them more likely to engage your services.

Scale your workshop output:

If you conduct estate planning workshops or collaborate with estate attorneys for seminars, consider offering attendees an AI-based summary of their estate plan afterward. Participants can submit their documents to you, perhaps via an encrypted portal, and you can follow up with a *complimentary estate plan snapshot*. With Vanilla, delivering on this is scalable; whether five or 50 people take you up on it, the AI can crunch their documents quickly. Your only task is reviewing the AI summaries and then reaching out with personalized advice.

Differentiate with technology:

In your marketing messages, emphasize that your firm leverages AI for estate planning. Tech-savvy investors and busy high-net-worth individuals will appreciate that you have advanced tools to make the process faster and more accurate. To position yourself as a forward-thinking advisor, you might write a blog or LinkedIn post about using V/Al to “ensure no detail is missed” in estate plans, subtly pitching that prospects can benefit from an AI review with you.



Vanilla’s AI tools can produce an easy-to-read estate plan snapshot, mapping out trusts, assets, and beneficiary flows at a glance.

Turning tools into lead magnets: A case study

One forward-thinking RIA is partnering closely with Vanilla to exemplify success in this approach. This firm has effectively turned Vanilla's estate planning tools into lead magnets through targeted digital advertising. The firm's cofounder has been a vocal advocate for making estate planning a core part of client acquisition.

"Vanilla is a really beautiful way of offering estate planning services to your clients in a digital environment. It's genius," the cofounder noted, emphasizing how the technology livens up what is traditionally a staid process.

The firm includes estate planning in their standard offering; they even advertise a *"Free Will & Estate Plan"* for new clients, made possible by Vanilla Document Builder capabilities. This compelling offer draws in prospects who might otherwise procrastinate on estate planning.

How the partnership generates leads: The firm uses targeted online campaigns (Facebook ads, webinars, email funnels) to offer value-first estate planning services powered by Vanilla. When a prospect clicks on an ad, they're taken to the firm's Vanilla-powered Health Check landing page (branded with the firm's logo and colors). The prospect completes the questionnaire and instantly receives educational feedback on their estate plan status. The firm is notified of their results, giving the its advisor team a qualified lead along with specific insight into that prospect's needs (say the checkup shows no trust in place for minor children, or an out-of-date will). The team then follows up with a personalized note: "We noticed from your results that you don't have a trust set up for your kids. Our advisors can help you fix this quickly."

Taking such a tailored approach improves response rates and prospect engagement, since the prospect sees immediate value and relevance. In addition to the Health Check, the firm runs campaigns offering a free Vanilla estate plan report or basic documents using Vanilla Document Builder. Since Vanilla's platform can produce revocable living trusts, wills, powers of attorney, etc., the firm can confidently promise a *complimentary estate plan* (something very few advisors can deliver at scale).

When a prospect takes the offer, the client guides themselves through Vanilla Document Builder to generate their will or trust documents on the spot. The prospect walks away with a completed basic estate plan and a strong impression of the firm's value. In return, the firm gains a client lead who has already experienced their service and is likely to continue the relationship for more comprehensive planning. This "give before you ask" strategy, using Vanilla's technology, has helped the firm rapidly grow its client base via digital marketing.

What you can learn:

Financial advisors can mirror this approach on any scale. The formula is to offer something genuinely valuable, such as an estate planning checkup, a summary report, or an interactive projection, to your target audience at no immediate cost. Vanilla's tools make it efficient and economical to fulfill these offers.

By partnering with an estate planning tech platform like Vanilla, even sole proprietors can do what used to require a full legal team. Whether through Facebook ads targeting local business owners or an email campaign to all your older clients' adult children, you can deploy these lead magnets to fill your pipeline. The firm in the case study proves that when it's done right, estate planning can become a front-end prospecting engine that differentiates your practice.