

SYLVESTER LAW FIRM ONE PAGER (10/2008)

Did You Know...?

- ◆ I attended a course on **advanced estate planning for retirement benefits** in mid-September in Minneapolis, MN. Minnesota was the first state where I became licensed to practice law. I continue to represent estate planning clients in MN, although very few.
- ◆ If your spouse serves as an attesting witness to the signing of an IL Last Will and Testament that names you as a legatee, the courts will likely admit the Will to probate, but strike the portion of the Will that benefits you.
- ◆ If you live in Lake County, I recommend that you vote for Judge Valerie Ceckowski in November. Judge Ceckowski is the judge of the Probate Court in Lake County. She is smart and has a very pleasant comportsment. She is also very respectful to the attorneys and parties that appear in front of her. Those are characteristics we need in our judges.
- ◆ I have moved my office suite. If you haven't already, please remember to update your contacts database to reflect my new office suite number: **420**.
- ◆ My Law Clerk, Thomas Speer, took the Bar Exam in July and recently was informed that he passed. Thomas will be sworn-in as an attorney by the IL Supreme Court early next month, at which time he will do some attorney-related work for me in an *Of Counsel* role. Thomas is currently working for me 3 days per week, and he's working on obtaining an LLM degree in Taxation on a full-time basis. He will obtain the LLM degree in December.
- ◆ I will be in Washington D.C. from October 15 - 20. I will be meeting with a wealthy family that has several joint investments within family limited partnerships and other advanced estate planning tools. I will still be available by telephone and e-mail during this trip.
- ◆ In the coming weeks, I will become authorized to conduct continuing education seminars for financial advisors and issue continuing education credits. As a former teacher, I look forward to this role.

Business Development Tid-bits

- ◆ Provide your prospects with a list of references. List at least 3 clients, 3 attorneys, perhaps the local bank president, and 3 accountants (*if you are a financial advisor*) or 3 financial advisors (*if you are an accountant*). Include the reference's name, profession, phone number and e-mail address. Often, prospects don't actually call your references. The mere fact that you list them increases your credibility. Of course, get permission from each person you want to list as a reference.
- ◆ Before meeting with a prospect for the first time, send the prospect a short letter (i) offering information about your services, (ii) answering frequently asked questions, (iii) discussing what takes place during the first meeting, and (iv) outlining your fees. When you put your prospect's mind at ease, he/she is more willing to meet with you. Additionally, you can quickly get down to specifics because you don't have to explain your services to each prospect.
- ◆ Provide prospects with a list of your competitive advantages (*the many positive ways in which you differ from competing professionals*). The list should indicate the depth of your knowledge, skill, qualifications and experience.

Recommended Product and/or Resource

- ◆ RCB Awards in Milwaukee: <http://shop.rcbawards.com>. I obtained my leather, monogrammed writing placemats from this great business. Contact Curt Denevan at (800) 929-9110 or curtd@rcbawards.com.
- ◆ Tax research web-site: Tax Almanac at www.taxalmanac.org.

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