

# **B2B probate scripts and objection handling, will disputes, and mobile home evictions | Estate Professionals Mastermind Podcast episode 90**

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## **Estate Professional Vendor and Referral Directory**

Welcome everybody to the Weekly Probate Mastery Group coaching call on the Estate Professional's Mastermind podcast. Our great host, Bill Gross, has taken some time off, so it fell back to me. So for those of you who are new to the community, I'm the guy that started all this. You probably heard my voice in the course or two.

Bill's been gracious enough to kind of be the host and the trainer, the coach for you guys. Well, let's talk about the earn course, bud, you brought that up. Thank you for the compliment. I want to like congratulate everybody who then Donna Londot, I don't know if you're here, but congrats to everyone who has completed the course and taken action on it and the results you're getting.

I think that's something that he has been stuck in my head for way too long and it's so, it's so rewarding to see that that, you know, if you guys haven't watched the testimonial videos, you know, within four days we have students who have gotten multiple deals from a half a dozen attorneys, two days taking the course, one day taking action, four days of appointments and multiple deals.

So it's really cool to actually see that come like the, the real world results from something that I should have done a long time ago. But really glad you guys got value from. Really glad to see, Like today in the Facebook group, I saw at least two people who were in, like, in the county courthouses. And like, you know, make an accountability post of, Hey, we're doing it.

So that's really cool to see. I'm really grateful that so many people found value in the course. Before we jump to questions and commentary and fun

conversation, there's one other thing that I want to, this is kind of an early announcement. It's not completely finished, but if you look at the URL that I just dropped in the chat, a state professional.org is the next step in adding more value to you guys.

So this is a, a national directory that we are creating. So you guys might know, Grant Cox has a national referral list that we've ran in our Facebook group for quite a while, and it's just a simple Google sheet where if you have someone, for example, when you find an ancillary probate, so you're in Dallas and then they have a second home in Summit County, Colorado. They have a ski condo. Well, you might need to look up someone who works Summit County. I see Dave Gwinn is here. So he's a good example. He's just outside. I mean, he's in the Denver market, but he could go list that condo. And that referral directory is a pretty basic tool that we've had where you can find other people that you can send those referrals to.

This is a whole different level of that; not only is it a CPE referral database where you guys will have special placement in this, in this directory because you are certified probate experts. We want you to have your vendors in there too. The more people we have in it, the more valuable it becomes.

The idea is to create a consumer facing tool where when somebody needs a, a professional, they can come here, know that they have a vetted, trained professional to connect with. So, for example, if you're a estate sale partner, if your vendor team is in there and you're a estate sale partner, is who appeals to the consumer based on where they are in the probate right now.

Guess who that, Guess who The estate sale. Partner has as a real estate partner, you, So we're broadening your surface area by, you know, I think most of you probably have at least a dozen, probably approaching 20 people on your vendor team. So we're giving you 20 points of consumer contact that come back and funnel the referrals toward you.

In addition, you have access to the thousands of CPEs across the country that you can send your real estate referrals to. So, the more professionals we have in this directory, the more valuable it is to the consumers and to us. So this is a very basic first iteration of it.

You can go to EstateProfessional.org and sign up right now. You will get an email and some more specific instructions and training on this. It's just literally just being developed. McKenna is just finishing it right now and a huge shout out to her for taking this project on and getting it done.

This is something I think adds a lot of value, whether you're an earned student or a probate mastery or both. In both courses, we rely heavily on our vendor partners and those referral networks. And this is just a way to make the work you've already done more valuable and give you more surface area and exposure to consumers.

So you can follow the link in the chat for anyone who's watching this as a recorded version. You can see in the show notes below EstateProfessional.org. We'll send messages out on, you know, best practices, how to use it, here's some new ideas and new features and functionality.

I've got a lot of ideas of where this will grow. I just wanna see how it's gonna take shape, how people use it. Gather some feedback and, and make sure you know that, that it grows in the right direction. So that's something new that you guys haven't heard heard about. So I wanted to introduce that today.

If you find it buggy or you disagree with anything like the way it's set up, we're also open to feedback. You can email any of that to support probate mastery.com or support@magnumopsproject.com. And we'll take suggestions for sure on how to make it more valuable for everybody. So that's that's kind of the housekeeping issues.

I'm gonna start with you bud, cuz you still have a green square. Tell us what tell me about your earn course. Like what, how's it changed? What action did you take on it? What results have you gotten? Well, officially I finished it this morning and. I registered on this estate professional.org a while ago.

It's not too buggy, it's not too bad. I just had to pay closer attention. How did you find it? What's that? How did you find estate professional.org? We've had like, I don't know, we've had a ton of people register and we've, This is the first time anyone's been told about it. Well it was at the bottom of the earn course.

Oh, that just happened yesterday. Okay. I can see what you gotta, Okay. We had last week we're like, where are all these people coming from? We had like vendors actually entering themselves into it. So the, one of the other uses for this guys, as a vetted company that come into this you'll be able to build your vendor team.

Just say, Hey, I'm in Illinois and you can potentially build your vendor team, you know, from someone of that prescribes to the same values that we do in this community. So I'd forgot we had already put it in the course. Good job bud. Yeah, just a button at the bottom.

# How to offer EstateExec to probate leads

I do have a question generally about the EARN course, or the EstateExec software.

Okay, Sure. How come I don't get it exactly on what I'm buying? I already bought the license and so. That means I can use it once. If I wanted to use it for another probate, I'd buy it again. Is that right? Or if I wanted to, if I wanted to loan it out, I could loan it out for a week for free. I, I'm not quite clear on all that.

I apologize, bud. I'm on starlink internet and it did fade out. Are you asking about a state exec? Yeah, State exec. You know, I paid the fee to license, Get a license. Now does that license do I have to buy that license every time I do another pr or, and and also you mentioned loaning it to lawyers and giving them the free trial version.

I guess if I wanted to buy it for a lawyer, it's how much, and, you know, can, can you run through that part? Sure. So you only need to pay for one license per client. The idea here is to use the, the, the nation's leading software tool to help executors. So this is a consumer facing tool. We have partnered with the state exec exclusively.

So you can actually use that as a to your own benefit. And if you read the letter that's in that section of the earn course, the letter essentially says, Hey, we realize how stressful it can be, especially early on dealing with stacks of papers and trying to manage inventories and list of assets and liabilities and all the errors and getting that all together for your attorney.

Here's a paper checklist to help you out with that. If you'd rather take that to the next level, here's some software that we'll provide for free. Now the call to action in that letter is please call me so I can get you set up. Obviously in a direct mail campaign, we want the phone to. So it's a very soft touch, like we're not even mentioning real estate or titling ourselves as real estate professionals.

The idea is to get the phone ring, get their first name, last name, email address, and then let the conversation go where it will. You have a 10 day, They have a 10 day trial, so they'll get to use the software for free for 10. If you have contacted a state exec at this point, right now, you can, you as a certified probate expert, can contact a state exec support team and request to be put in as a service provider.

So you will actually come up in their checklist when it says, Hey, it's time to talk to your, your local probate expert. Then Bud Thompson will come up in, in the Des Moines, Iowa checklist like his, or, you know, like Nebraska. Sorry, Nebraska. I don't know. It's been too long. But but Bud would come up and then the Nebraska checklist for that state as the probate expert.

So when they reached out to talk to a probate expert, they'd be like, Oh, aren't you the guy that gave me the software? Yeah, actually I am. It's something we do for every family. So that, that's another call to action that might bring them back to. At the end of the 10 day trial, they have, you have a choice to make.

If they want to continue using the software, you can pay the \$85 license fee, and it's a one fee. The, the consumer fee is \$200, but we've negotiated it down for you guys, so it's only \$85, and that's locked in. So you can pay \$85 for them to continue to use the software. Now this gives you the ability to be the hub where you can actually share that whole estate with an attorney.

You can share it with an estate sale company so they can see the inventory, you can share it to whomever you want, obviously with their permission. We've also made the development changes where that you can say, Okay, you know, if you don't want me to see all of this, or if I'm no longer associated because the real estate's already sold.

Then you can give it back to them where they are, the account owner or the license owner. But it's, it's on a case right now. It's a case by case basis. So you start with a 10 day free trial, and then if they are finding value in the software and they choose to continue using you as a professional, then you have a choice to make.

Is it worth 85 bucks for me to keep having these conversations with this person? It's probably cheaper than direct mail and phone campaigns and all that stuff. Yeah. So the idea is a, you know, an early value piece to get to, to get them to, to communicate with you often, so you build that relationship and when it comes time to sell the real estate.

Who, who are they gonna talk to? You're the one they're coming to for advice on everything. Now, as far as the attorneys budget, your, your specific question. If you bought this \$85 license, the family is using the software and the like, you can simply just add the attorney's email address and it, it will send them a copy of the estate.

There is a backend software for attorneys, a part of estate exec is for four professionals and we're still working with their team on how to tie the estate professional.org directory to the consumer facing estate exec to the professional facing estate exec. So it all kinda works as a suite and we're all, you know, it's all one interconnected software tool for the community.

But that's kind of what it is and how we intend for it to work. Any other questions on, on that? Okay. So it all starts with a list of personal representatives in estate files which I'd have to get from somebody ATL or somebody, right? Yep. Got it. Okay. But over time, and if, and you should go ahead and do this if you haven't, contact their team and go ahead and get yourself in there as a certified probate expert.

That way when somebody from Omaha, Nebraska finds a, a state exec, whether they're on a list or not, you will come up in the checklist. So you're going to, you'll earn referrals from being part of the software or you'll receive business, you'll get phone calls. And right now that's a, a kind of a. On a a case by case basis.

There's, we haven't uploaded all CPEs in because, and I, I really appreciate this, you know, Dan and his team at a state exec, they wanna make sure that the people they're highlighting as a pro, a probate expert are in fact probate experts. And they are not just a realtor investor begging for business harassing families, but they actually do have a team that can bring value to the family.

So, not everybody, I mean, I would hope anyone who's on this call is going to get to be allowed in there. But anyone listening to this recording that might not have taken our courses and, and you haven't built a team and you don't have a valuable offer for the community, you're probably not gonna be put in there.

And we've gotta find right now, those, those decisions are being made, you know, by personal vetting. So tell us about your business. Show us your website. Like, how can, how can you prove that you can actually be helpful to these families? Because it's very important to them we're not just putting in a bunch of deal hungry real estate professionals who don't want to help with anything else.

Cause that's really not what we prescribe to here. Right. Okay. I got you. All right. Appreciate the help. Yeah. All right. Steve Carney, good to see you. Action. Jackson. That's, it's nice to see you back here. It was so long ago we were on calls together. Glenda has got the course and is ready to dig in.

Awesome. Any other questions? Oh, I see Lou has a hand up.

How can I help you, Lou? I spoke to Dan last week and he said, so basically he walked me through it and he said that you don't even have to buy the license. You have, you set up your account and then you can actually send out invitation.

Right, basically. And then it's, Well, you don't have to buy you, you start with a 10 day trial, okay? So you can, you can sign up, you start with a 10 day trial, and then at the end of the 10 days, then you make a choice. Whether you buy it for your, whether you buy it for your client or prospect, or if you, if for example, if they don't have real estate or they, they intend on keeping the real estate, there's no way for you to monetize the deal, then you can just transition and say, Well, listen, let me do you a favor.

There's not a whole lot of, a whole lot I can do to help you. But instead of you paying \$200 for this, let, like you, you can, you know, go here and, and use this link and you can pay \$85. So you're still getting some social credit for doing them some good. But really remember what we learned in probate mastery and, and every, every other conversation we've ever had, like, Just because these families don't have real estate with a high motivation to sell, doesn't mean they're not valuable to your business.

Right? They, we can turn them into private lenders. We can help them become investors. We can sell them, you know, take the, the proceeds from the estate and sell them investment property. So it's probably still worth \$85 to be like you know, to, in the eyes of the, of the personal representative, to be a local expert and professional.

I would pay 85 bucks for that because anytime they need anything, they're gonna call me and they're gonna see me as a valuable resource in the community, and that's worth 85 bucks. And then he said as far as the referral part, they're very specific about what shows up on your webpage or your website regarding what your services are.

Yep. What they wanna see is essentially what we taught in probate mastery is you, you're a, you, you have, you know, if they call and need to get a suitable living situation for a disabled senior, do you have a social worker in your network? Can you, can you refer them to somebody you trust locally? If they need a senior moving company, do you have that?

Like, do you have like a white glove senior mover? So just, you know, are you truly, you know, a, a local expert that's well connected where you can actually

help them find other people that might not be listed in the directory? That's kind of the, the filter that, that, you know, that they're passing people through.

The biggest thing is they just don't want someone on there that's gonna say, Oh, yeah, yeah, I, I do it all. And then every time a lead hits, they're like, Hey, I'll buy your house 50 cents on the dollar. I got cash close fast. I'm gonna get there today. You know, using fear tactics and aggressive tactics, that's what's important to them that we don't end up with on their platform.

Well, I'm not accusing anyone here of, but it's what we do wanna avoid.

All right. Kat has said in, in the notes: licenses are for individual executors. If you're buying a license, it would be on behalf of an executor. Yeah, so just to clear that up, you're buying the license on behalf of your potential client. Bruce Johnson, you're so your hand up first. How are you?

## **Referrals from estate attorneys and SOI marketing (Success Story)**

Hi. How you doing? Good, good. Hey so I reached out to this attorney. I only talked to him two times and he sent me an email the other day. And he's putting me in front of some people that have an estate here. They've got a couple of properties they've, they've got, So I, that's really, you know, appreciated that.

And lo and behold this morning, I called one of my past clients and actually their, their parent had died this month. And so he was scrambling for an attorney. So guess what I called . That's amazing. So, so I uh, I, I gave my, because of the anti ization loss, I, I gave the attorney the information, plus I gave the contact information for that attorney to my client.

So, he's gonna, and the attorney says, Hey, listen, I'll give him a free consultation. I said, That's great. And by the way, you know, like, through the attorney before we move on Sure. Before we get to your, By the way, what's your next step? Like, you've made that connection now, what? You just let 'em do, let 'em go on your own?

Or what, what's your next step? Yeah, well, there's, there's no property left with my client. So we, the, the property's already been sold. So that that's fair enough. That's fine with that. Yeah. **And so for the attorney, I'm gonna follow up with my client to make sure that he has actually called the attorney.**

**And so they had a conversation because, you know, it's a free consultation.** But one of the things I wanted to mention was that during my second phone call with that attorney, he told me that they're really strong on litigation in probate. So that's something that was good to know. Say, Oh, okay, this is their, their specialty.

They will do admin. But he said that we really focus in on litigation. He says, he says, That's where we, we feel we're really good at. So that's a really good source to have in case that that pop. Yeah. No. And that's where when your other attorneys are struggling, like when a deal goes sideway, when a case goes sideways on them, if they don't have the litigation, you know, the proven track record, then you can refer him another, you know, referral from one of your other attorneys and bail them out.

Right? What I was alluding to earlier, like the great job on, on quickly reciprocating a referral to the attorney. He'll never forget that. Take it a step further. Make sure you take John ER's advice and as he put it, you know, the, the CPAs, the registered investment advisors, they never take their hand off of a referral, Right?

They see it all the way through. And if you follow up with that person and say, you know, I just wanted to make sure you connected with Joe, how did it go? You know, is is, do you feel like he's a good fit? They're gonna respect that. And if they ever get to a point where they have a \$200,000 inheritance check and they know you're a real estate professional you know, just make sure you're mentioning some of those things that you can provide.

Like, Oh, by the way, you know, I'm glad we could connect you. You know, Joe is, is in my network because I am a real estate professional, but we predominantly focus on, on families, you know, going through, through this. But what we oftentimes find is those families oftentimes wanna buy real estate after the estate is settled.

So, if you guys have, if you guys wanna know what your options are for looking at investment, real estate, vacation real estate, becoming a lender to actually fund investment real estate in our market, to double your money every three or four years, just, you know, we're always here. If we can help you in any other ways, it's just a really good point to a contact point, a reason to follow up and let them know, hey, we can help in, in all these different ways.

But that's really good, man. So referral. Referral. Earned referral given in in a week. That's great. Thanks.

# Probate seller wants to fire attorney; dispute over will.

Next, right? Jaylyn? Yeah, Jalen. Yeah. No, you good. Um, So I just bought the course recently. I'm on the part regarding a vendor team.

So I talked to Pace Morby like back in 2019. So I wholesale and I also do well, I'm a licensed realtor as well too. Got my license back in December. Good for you. Appreciate it. He a full toolbox. Yeah. Yeah. He had told me about, you know, contacting probate attorneys at this time just before he was teaching and things like that.

So I actually started up a company, I'm just now, I was tapping into it and I senior class and I just started taking it. So I literally, yesterday got a call where I think last week, so I have a lady to where she's her husband passed back in March. And the thing is, her son, well his son, her stepson came into property took a few things and he had tried to start the probate process itself.

And she didn't know, cuz she at first was saying, Oh, well, he has a will so I shouldn't have to go through this. I have to explain to her yesterday, it is my first time meeting her yesterday, I had to explain to her like, well first you would need a, a trust to avoid probate. Right. And she didn't know that at the time.

So her thing is now, right? She had her stepson trying to start this process and I think he was trying to get something, but after he found out she actually had a will, he kind of let everything go. So they was already in court. And the attorney and also her son was stepson, had let everything go.

So now she's in a space to where she had also hired her own probate a. He, he, she already gave him a thousand, I think a thousand and \$2,000. He, she told me he didn't do anything. So she's in his space like, Hey, I don't, she's trusting me right now. I came in, I was like, I don't really wanna talk about the property.

I wanna see how I can help you in this situation. I had been through this process, my lost my father a few years ago. And that's why, for me personally, I feel like this was like the perfect route for me. Cause I understand what these people are going through. So I was explaining that to her. And then also too, I'm like, you know, I wanna just see how I can help you through this process.

So the only thing is, well, one, I just started this, so I haven't really connected with any probate attorney. So my thing is I don't wanna direct her to the wrong

probate attorney. Now she's looking at me like, Oh, well, one, I'm not. Cause her other thing is she's not trying to give up any money as well too, right?

So, like I had told her, maybe I can have somebody. To talk to her for like an hour and just see how can, we can either, cuz she's guaranteed to sell the property, but I, I think that property is not, She's trying to just sell it, but that property is more of a listing. It, it is nice. Real nice. It's not for a wholesale.

I told her that yesterday. But I'm, I want to see if it's possible if I can have a probate attorney. Even if he wants something up front, of course, but put the rest on the back end once he selled a property. So here's my best advice on this one. You've already got two probated attorneys. Let's make sure we get rid of them if we're gonna bring a third one into the, into the fold.

Right? Because they, they just as a general role, you know, they, they, they're confident people, they're ego driven. Right? Right. So you're likely to create an even more adversarial position among competing attorneys for the same limited funds. And, and so the first question that like, let's, let's hold back on that.

Okay. You didn't say this. Has the stepson actually abdicated his role as personal representative or he still the portal That's what he was trying to do? I think. All she told me, once he figured out that they had the will that she said, she talked to the attorney and him, they both just said, Hey, I don't want anything to do with this.

So I think once she went to court, One A didn't show up. And then she's lost, you know, she went to court and the judge was like, Well, you still gotta go through the probate process, so you gotta get an attorney of your own. And she's lost, right? She's like, Well, I could do it myself. I'm told her, ah. I'm like, I don't think you can do it yourself.

Like, I think you are, need a license you know, probate attorney. And then she was like, No, she can definitely do it. Pro se It's not usually a good idea. Okay. Yeah. Okay, So here, here's what I'll say. You've, you're empathetic to this cuz you've been through it. You remember the fog you were in when you lost your dad and you had to keep all that stuff straight in your head and like, there's holes in your memory you don't like, there's entire days you don't even remember.

Yeah. Correct. When working with families, especially ones in contentious positions like this, you have to trust, but. They could be the case. The attorney told her exactly what to do. She didn't even remember. It didn't comply. Right. These other emotions were spinning around because her stepson was

overstepping his bounds and convoluting the whole thing, and the attorney might've said, You know, why don't you come back when you've got your shit together respectfully.

Right. Right. What I would recommend doing is she's, she's trusting you to run point on this right now. That, that speaks hugely to the conversation you had. You did it right. What I would do is get her permission to visit or talk to each of the attorneys, call and get their side of the story before you take action.

Because they may be waiting for her to do something they told her to do. And the reason they didn't show up for court is because she hadn't done what she said she would, and they weren't ready for court that day. But make sure you truly get the attorney's side of the story before you take action. Okay?

I'm not saying that it's, it could very well could be the attorney's fault. They could be overwhelmed. They may just suck at what they do, but make sure you verify that first. Yeah. The other thing is on, on her behalf when you talk to that attorney, so, you know, have you taken payment, you know, like, and you may actually do this as a conference call and just ask her to be there because there is attorney client privilege at stake.

If they've, if she's retained them you know, but if the fi, if they're, if, if the person they're fiduciary to the client is on the phone and you're on the phone, she's giving you permission to ask these questions. Right. Try to try to straighten it out with one of the two. And get them back on track first.

Okay? If you can, if you know, if, if you determine that they're really, they don't deserve to be on this case and that they are at fault, then you need to be direct on her behalf and say, Okay, so we don't proceed with this estate without your help and then get an invoice. What does it take to close out this, this attorney client relationship?

We want to end this right here, right now and get her out of it. Like black and white, no question. Like, don't just go on and do it. Because if they're, if they submit invoices to the estate later, like, is, is she gonna be willing to pay those? So, clear that up. Now, just say, I wanna be clear. Have you, do you, have you been compensated for the services you provided as this attorney client relationship severed here and get something, get an email at least.

But I would try to clean up that mess first. The next thing you need to figure out is, did the steps on officially abdicate his role as admin, as as administer? First of all, did the will appoint that stepson as as the executor or did he overstep his

bounds and, and petition to be administrator? It's funny, she showed me the papers.

I think she is, The will, I think appoints her. Okay. Yeah. I'm really shocked that the judge didn't, that, that he issued letters on that if there was a valid will and without the executrix being present, he appointed the stepson as an administrator. What you might find is that the stepson may have the letters of testamentary, but they might have her name on them.

She may be the one with authority. Right. So she showed me everything. Cause basically what he was trying to do, you know, he came into property when she wasn't there. He took, he basically told the probate attorney, Hey, we don't have a will. And she was trying to tell him like, There is a will, I just can't find it.

She ended up finding the will at points where she gets her stepson, him and also I think the grandchildren as well. And she showed me that, you know, and that's when I think the, he probably, his attorney probably was like, Well, it's nothing that you know, this, Okay. So I want, I'm like, More, more facts are coming out.

So probate, was he, he petitioned for probate right. With himself as the admin, the petition or becoming the administrator saying there wasn't a will. Right. But after the, after the fact, the decedent's wife actually has a copy of the will and you believe it to be valid, but the court's not aware of it.

Right, exactly. I think when they had their first court date, he didn't show up and it's like, well, I'm, She's like, I'm here when she, And then, Okay. Did the stepson retain on those two attorneys? Who retained them? The stepson or the mother? So she did the second one, right? She did the, He did the first one.

He was like, Well, I'm gonna start this pro baby process myself. And then once they found out, it said, Well, he stepped back. Then she got her own probate attorney. And now when you guys said that she like, give money, she did. She was like, Well, I gave him a thousand dollars and now this guy keeps coming back.

Well, I need this, that, and the third because we had this conversation and then she, Right. My, my advice is changing in light of these facts, you need to talk to probate attorney number two, who is retained by your prospect, who should be the rightful executive tricks of this will, that attorney needs to, to get a copy of that valid will to the court.

And you've gotta unravel the mess that's happened here because stepson went and hired an attorney that like he does, he's not legally a representative. He shouldn't be a legal representative of the estate. So, You may just like let him clean up his own mess there, let the attorney invoice his ass and let him clean it up because the attorney can't invoice the estate if he was unauthorized to actually retain legal counsel on behalf of the estate. But if attorney number two is a good attorney and is willing to help you guys through this, what I would recommend is you approach the probate court in your county and say, Listen, this should have been the petitioner. She's obviously named as the execut tricks in the will. We would like to submit this will to the court.

And, and you know, I don't, I'm not, I don't know, wish we had an attorney here right now. I don't know how that works in your market, but you need to, the court needs to understand that , that what the, the current open probate proceeding is probably not valid because he tried to steal the, the administration from her.

Right. I would go to attorney number two first. Give them all these facts. Say listen, I understand man, I just got into this mess too, but let's help her through this. And you might wanna do that face, you might wanna get copies of all the documents. Take her with you and do this one face to face. Okay, this one, my last question.

So now she's on the offense of, I don't wanna deal with him at all cuz he done told her, Well, I'm going through this my personal life, you know, so now it's like for her, Okay, you don't even have the time to actually work out these things. And she's so much on the offense of like, I don't want to like deal with him at all.

At all. He just seemed like a money grab person, which I'm with you, I understand it's both sides to a store. So for me, I just need to hear him. But like I said, she's so, like, you know, he told me, Oh, he has a lot of family issues going on right now. He had to put this on the back end. But at the same time, he's asking for money.

So he probably may be looking like, Okay, I'm not getting this and that, you know, So for me, I'm not about to really focus on this right now. So Mrs. Smith, if you worked 80 hours a week and didn't get paid for nine months for all the hard work you've done right, wouldn't you ask for a retainer to, right? So you may perceive it as unreasonable, but I understand his business as, as a probate professional.

I understand what he's going through on his end co. Can we agree to just give him the benefit of the doubt that it's not a money grab, he's just trying to keep the lights on and we can have a, a grown up conversation to try to get this unraveled. If he, if I get a read on him, but he's greedier, if he, if he's stepping out of bounds, I'll tell you when I think we need to fire him and, and find the right attorney.

But can we at least try, since you've already paid a thousand dollars, can we at least approach him, have an adult conversation and see if he is the right person? And I can't wait to watch you ask him across the table what you know, how he's gonna be different going forward than he has been so far. And I got your back in that.

And give her some confidence like, but get a commitment that she'll, you know, approach that attorney, not just shut down. Because if she's paid a thousand dollars retainer, I mean that's worth probably five hours of his time. Right. And it sounds like she's really emotional and is good at pointing fingers.

Yeah. So even though you're looking to be a fiduciary to this person, again trust but verify. Right. You, it sounds like you're gonna be the intermediary in this and you're gonna be the one that she trusts and maybe the buffer between the attorney and it sounds like it's probably worth it cuz there's a valuable piece of real estate that you're gonna probably sell for her, right?

Right. Is her intent. Have you asked her intent to, Is it to sell the home? Yeah, it's her, I mean, her husband passed in the, the home. So like for her is she wants to sell ASAP and I, she wants to like just a cash offer and get it off quicker, which I can't wholesale. But I kind of was honest with, I'm like this maybe more.

I don't even like, not, I don't like the the realtor apart, but more our wholesale. That's my number one thing. But to be honest, what I told honestly, like this might be more for you to probably list the property. I'm like, you can go this route. But to be honest, this is real nice property. She did everything to the property.

I was like, it might make more sense for you to list the property. Yeah. Yeah. Is the house in the probate or did it pass? It, it, like oftentimes if their husband and wife with has tenants in the entirety, oftentimes the house doesn't even, it's not even part of the probate. Well, I know it's in a will if that's what you're asked.

If that's, that's okay. That doesn't mean it's, it's part of probate. It's state law. Like the way that, the way it was titled can, can pass it from, from spouse A to spouse B. Oh. He's the only outside of probate. Oh, okay. He's the only one on title. Okay. Then it has to be probate. Where I was going with that is you may have a really, really great owner financing deal there, right Where you could offer, offer, offer it on the retail market with owner financing in a high interest rate environment, and then not get beat up on during a price correction.

You could sell it yesterday's value without an appraisal and get her all that money over time, but you've got, it's got a clear probate If she wasn't on title, Right. Okay. I gotcha. Gotcha. So sounds like you got a little bit of work to do, but a nice reward at the end of it. And it sounds like you got a really emotional prospect, but she could make a good client with good leadership.

So yeah, I would start with attorney number two. Try to get them back in on good terms. Okay. If you, if you can't do that, then, then look for a, you know, a fresh attorney to, to start that relationship with. If you are in communication with the stepson, if it were me, I'd tell him to go clean up his own mess and pay that attorney.

We better not see invoices on the estate. Right. Cause it's gonna cost, it's gonna cost the estate more now because of his recklessness. The state's gonna have higher legal fees. Right. Cause you got billable hours to go clean up his mess. Right. So he, to stay in his lane if he wants his money. Okay, gotcha.

Thank you. I appreciate that. Yeah.

## **Mobile homes, evictions, and securing property**

Steven Hughes. How can I help you, sir? Hey, so, I do a lot of mobile homes, you know, and I've had a couple that have been probated. But I recently got hired by one of the mobile home mortgage companies to do their eviction, cleanouts and repossession and such.

I've done one, you know, I just gotta send 'em an invoice, but I have another one where the tenant's actually in there and they're wanting me to go there with local sheriff's deputy to serve the papers and all that. I have never done that, so I am just throwing it out there to see if you have any just sage advice about doing that sort of thing.

I mean, I'm assuming they're not paying you massive amounts of money to do. The first one was like 300 bucks. I went in and took pictures and then they sold it. This one they'll pay me to do it, but then.... so I have a dealer's license and then I'm also a real estate agent. 20% of the mobile homes for sales, Salt Lake County are mine.

It's a big deal of what I do and they reached out to me. This one they'll probably hire me to list, you know, but it depends on the repairs they have to go into it as well, you know, cuz it's technically a car. That, that's what this one's looking like, is I'll get that upfront money to do this, but then you know, I'll either flip it or just list it as a normal house and get paid a commission or some sort of market because they wanna recoup their costs as well.

Yeah. So they're asking you to go do the cleanout just on the heels of the sheriff, like whatever's there gets thrown away this today. Is that why they're asking you to do this? Yes. They want me to get there with the sheriff, have 'em served, get the keys, have the keys changed, and then, you know, basically secure the property and then do a clean out and get it ready to put on the market.

Are you comfortable putting your life on the line? Well, I mean, it doesn't bother me. I mean, I'll be there with the deputy. And I always pack when I go to mobile home parks cuz I've met crazy people. Yeah. The deputy's gonna go home after he's done his park. He's gonna go home. I mean it's, it's, it's his job to vacate the property.

Like if you're there just changing the locks, my advice is, you know, to earn the business and keep that relationship, go secure the property and then get the hell away from it and let things calm down for a few days. Okay. Don't do your, don't do your clean out the same day. You might find yourself at the end of a drunk shotgun barrel after dark.

I, I would let the emotions settle and I would secure the property if that's their request. I would do it while the sheriff is present in case anything blows up. Let him deal with. And then I would just be real busy for a few days and until I could get back, you know, then get back there and do your clean out later, I wouldn't do it same day with, Cause I, I mean, yes, I have seen it and it's, it's very emotional.

Oftentimes everything they own is in piles on the porch because someone's locking the door and there's lots of screaming. And luckily I've never been in a guns drawn situation, but I know it happens. So if I were you, I would do the

minimum to satisfy your, your vendor and then come back later when things have calmed down to finish.

Okay. that's very helpful.

## Finding good probate attorneys (Probate Court Visit)

This is my second question, unrelated. So obviously did this course, trying to break into probate, cuz I came across probate on a couple of senior deals. I have like the SREs, you know, and I've, I used to work with a couple placement agencies, but man, I, I'm really getting away from them and I'm just going straight to like the assisted living directors.

So much easier and dealing with these, these placement franchises are. I'm really opinionated against them. But with probate, taking the course and all, I actually went down to the Salt Lake County Court on Friday. I hadn't done it, but Bill Gross talks about it. And I talked to the clerk for over half an hour.

Very nice. You know, I bragged that. I've never had a government employee that actually treated you with respect, but this lady was awesome and she was like, Hey look, we do it every Wednesday morning, once a week from nine to nine 30. It's Judge soAnd. So come in here, become a couple minutes early, introduce yourself to the judge so he knows you're watching.

And she goes, Come every week and you'll start seeing the good attorneys. Here are the ones that actually are still showing up in person and you'll see them a couple times a month and start making a list. And she said, If you have questions about 'em, just come talk to me. So I, I kind of wanted to compliment cuz Bill and others have said that.

I mean, when it comes to referrals and that sort of thing, I've never had anyone be that helpful. I. I'm, I'm gonna offer the, I'm gonna compliment you. Like they, I have tried to, I've tried to motivate thousands of people to do what you did and what Bill Gross did. Bill's one of the few people that actually did it like that actually went and, and had the courage to do it.

What's fun is the people who do it, I'll come back with a very similar report to yours like, Oh my God, they loved me. And it's because so few professionals have the courage to go do that and go say, Actually I'm, I'm not the the leading expert, but I'm gonna be, and that's why I'm here.

I'm here to learn. I'm here to connect, I'm here to help. And you get that response, like these are public employees that are overworked and underpaid when someone comes and can make their job easier. Yes. They're happy to see you, they're happy to help. And I've actually done that on the phone, like remotely done three way calls with people just to prove to them that you can offer real value to a probate clerk, to the judge to, and.

I don't see Rodger Lecy here. But Rodger did this and he got to the point where he was being paid as a court expert. Like they paid him to come testify. Like that's how far it went from for him. So good for you. Like the compliment's yours for actually going down there and doing that.

I'm sure good will come from it. And if you do it consistently, like Bill does, you know those attorneys will know you. Like, they'll, you'll start to get their referrals for probate, for trust, for divorce. That's the other thing. Roger Le ended up being a divorce specialist because the probate attorneys are like, We've never worked with anyone like you.

Can you do what you do in probate, but do it for this, this couple. And he became, you know, their go to divorce referral. So good for you for getting out and doing. Yeah, it's exciting. You know, they don't want you to film in parts of the courthouse, but I did the video out front. I'm just editing it now, but dude, I'm gonna put it on my YouTube channel and on TikTok and everything cuz no one has that here in Salt Lake City.

That's great. So it's like, I'm gonna do that too. But yeah, it was cool. And, and I'll tell you, the probate stuff has made my conversations with these executive directors and sales reps, managers. They all have different titles. Depends on the facility. When I say, Oh, not only, you know, do I do the senior stuff, but I also survey probate expert.

They're just like, Oh my gosh, that comes up with the several times a year and we're not attorney. We don't know what the, you know, I mean a couple people will call for language. Like we don't know what to do with them when they start bringing that up to us. You know, cuz one of them's in the community but grandpa was still in the house and died and now they're in probate and then it ties up all kinds of weird stuff and it just causes stress for them.

So it's very interesting. It's a cool thing to bring up. So it's been helpful on that side of it as well cuz there's a lot of overlap. With the 55 plus demographic and probate. Tons of overlap. Yeah. Anyways, thanks for the help. Yeah, sounds like you're doing great out there, man. Keep up the good work.

Thanks. Thanks for sharing.

## Probate Script for prospecting attorneys

Deborah. How can we help you today? ? Hello. It's good to see you back! This Will sound redundant, but this is about the exec whatever it's called, the licensing, EstateExec software. Yeah, Yeah. Okay. So I want to approach attorneys.

I already got a couple ladies already lined up that I'm going to go and drop in coming to their office. Okay. So I purchased the the, the license first, right? Mm-hmm. And then I bought her No need you. No, no, no. I need like a 1, 2, 3. That's what I need, . Sure. I'll give you a 1, 2, 3 on how to approach the attorneys with that offer.

That offer is actually designed, that's designed to approach the personal representative. So the way that it's taught in the EARN course is you send this letter to the personal representative, giving them a paper checklist that they can use. You can choose whether you use the national checklist or if you wanna make it hyper local with your attorney.

That's how it's designed to be used. You're thinking outside of the box, you're, I think you're reverse engineering here. So if you want to use that offer to attract attorney conversations, take the checklist. And say, this is our national checklist that we send out to clients. I really have been looking for the right attor or the right firm to partner with to make this hyper local.

And then take a letter of that one, that, that one page letter that I wrote, so they can understand. Like in having attorneys and even the estate exec employees read that letter, they're like, Oh, this is brilliant. Like developing and owning the software, they hadn't even thought of using it in that way.

So what you can say to the attorney is, "we will actually include this letter and this checklist in every piece of direct mail that we send out to every single estate that files every month. And you, I'm looking for a preferred attorney to actually send the referrals to for the ones who don't have representation.

So can you help me design this checklist so it's local to our market? and, you know, I'll, I'll repay you by sending the referrals your way." So you can use the marketing materials and you can ask the attorney to help you customize the local probate checklist. And then that gives you an opportunity to show them that letter and how you're interacting with the estates very early in the process.

And how, I mean, a lot of them have not hired attorneys yet, so most have, but about 20% of every list doesn't have representation. So for the ones who respond to that, they don't have an attorney, you send the referral to the attorney, but it gives you a great opportunity to sit down and talk with them and borrow their local knowledge to customize that.

There were two checklists in that in "how to provide value." One was, was the national, and that's like not state specific at all. The other one is the national one with blanks, like fillable pdf. So you can actually sit down with the attorney and make it, that, that your, your local copy of that. Okay.

And then you can explain to them how by being the preferred attorney in your letter, like the suggested attorney, or the one sponsored by, or prepared by, you're not directly soliciting them for legal services, but they see his firm name because he is the one that helped you prepare the checklist.

Okay? So you're basically marketing for free on behalf of that attorney. You're asking, Can I provide value to you, in return can I get a little help making this checklist really, really local and specific. All right.

That's a big help. Yeah. And then also remind them to be part of the directory so you can interact with them on estateprofessional.org. Let them know that you're part of a nationwide community of estate professionals, and we now have a, a directory that they should probably be part of. So you can send them referrals from inside of estateprofessional.org

All right. Well, thank you so much. Yeah.

## **Overcoming probate objections: My attorney said not to hire you**

Miriam Cruz, Good to see you. How are you? Hi, I'm good. Yay. I was hoping I would get a chance to talk to you guys. I'm doing very well. Things have slowed down here in California a little bit for me, but I had a good year so, so now I'm tackling some of the main objections that I get, and there's two that keep on coming up.

Mm-hmm. one of the ones that I dealt with yesterday, which was my biggest fear, and I just kind of did what it had to do. So, some of my clients or some that I would hope would be my clients tell me, Well, my attorney said I can't hire you because they want me to work with someone.

And a lot of the times the people say, But I really like you, Miriam, I wanna work with you. I'm like, I know I like you too, but my attorney said, Absolutely not. So yesterday I called the attorney's office and I spoke with the paralegal who told my potential client not to hire me. And I said, You know, you don't know me and you're already telling people not to hire me.

She said, Because agents - good for you! - Are full of it, basically. And I said, Yeah, but I'm not one of 'em. So I told her this is who I am, you know, and I broke it down. I used to work for the courts, I know the legal process. And she was kind of like, Oh wow, okay, well people are normally not like that. And she said, Unfortunately, because so many agents don't know what they're doing in probate, we've only selected a few and we only wanna work with these people point.

I said, But you don't know me, so I think it's unfair for you to tell Maryanne not to work with me. So she said, Okay, let me talk to the attorney Maryanne, the client's gonna come in and we'll talk to her too, cuz Maryanne is so cute. We don't even, we just met each other weeks ago and she said, I'm gonna fight for you, Miriam, because I want you, but they won't let me.

So in that sense, this is the first time that I did that. And I was literally shaking when I called the attorney's office, but now they're like affecting my business and also my ethics standards and everything that I stand for. Mm-hmm. How, How do I deal with that? Cuz it happens so often?

Okay, before I answer everybody on this call, you just heard the biggest reason this community is so important and she had the courage to go stand up for her integrity and what we do here.

So let's give her a round of applause. Thank you. First of all, like that's, that's awesome, Mary. I'm like, way to believe in your value and defend that I would've showed up in person with the prospect in tow. Yeah. And we would've had a, probably a different conversation. But this is perfect evidence of why this community is valuable. Why, like by doing this a certain way is important. And you're gonna see more and more of it because the population is aging and it's becoming, you know, there's just more and more numbers coming through the probate system. And honestly, more and more licensees with lower and lower levels of professionalism.

So it's a really good selling point if we learn how to do that. When the first response I would've had to her, the, the prospect before, let's go all the way back

to before you actually did what you did, and I think you did the right thing. But my response to her would've been, Why do you think that is?

And that gives you an opportunity to highlight two things. One, the lack of professionalism by real estate professionals in the probate space or the lack of knowledge and leadership. And that gives you a chance to really show why you are different. You have invested hundreds of hours. You've, been part of this community, you've been active into Facebook group, you've taken the courses like you, I see you coach other people.

I see you share your success stories. You can say, I'm part of a national network of thousands of real estate professionals who hold themselves to a different ethical standard and an educational standard. And I'm willing to stand in front of that attorney and say that. What are you doing in the next 30 minutes?

Mm. That would've been been one way I would've taken it. Okay. The other thing I would've said is, that's interesting. So you, you hired this attorney to be your fiduciary. What that means is they have to put your interest first in every instance. And they're prejudging a real estate professional that you chose without having an opportunity to even speak to me.

In my opinion and my ethics, that's a violation of their fiduciary responsibility. I may or may not ask the bar if they agree with me. But either way, let's go talk to your attorney, jump in the car. Like either way, I would've, I would put doubt in her mind if they're doing that, I would put some doubt in her mind and get her a little fired up.

And you accomplished that on a phone call. I would prefer to look that paralegal in the eye and, and see them get all marble mouthed. When they try to justify why I wouldn't like someone they didn't know. And there's a lot of different ways you can approach it, but I would've gone one of those two ways to defend my integrity.

Yeah. I think either way that if she wouldn't have agreed to actually allow you to approach the law firm, if you don't think you're gonna have access to the firm, if they won't take your call or they don't have a, they have a virtual office and you can't walk in and defend your position, if you keep coming up against it, just say, Eh, that's really common.

We hear it a lot. Why do you think that? Okay. And then you get her, you get her and her prefrontal cortex going, Oh, I don't know. Well, it's because they

expect I'm not a professional. They don't know that I'm part of a network of thousands of estate professionals nationwide that all help train each other.

They don't know that I've dedicated hours and thousands of dollars to my education. Yeah. So if it's okay with you, can we give 'em a call and we'll help 'em understand that? And I don't think there's any better way to handle it than you did. I would've been a little more aggressive just to make an impression with that law firm.

Yeah. And I would do a, I would do a really, really good job on the back end, and I would be one of those three people than the next time. Yeah. It's just uncomfortable because, you know, it's their attorney. And I don't wanna bad, I used to work with attorneys, so I know how they can be, but I don't wanna talk about bad about them.

You know, I wanna work with them also. And maybe in the future, but it's a little bit interesting. But yesterday I'm like, Okay, I, I've had it with this shit because these people don't know me and they keep on talking to my people that do wanna work with me and they're preventing them. And I'm, I'm highly qualified.

I lead with my heart. I'm a great person. I know what I'm doing. If anything here in Santa Clara County, working with me is, great because I have connections at the probate court. My best friend is a supervisor at probate, so you can't get better than that. But these people don't know. I think you need to make a, I think this is something that I took out of the EARN course.

After I, as I was producing it, I started to put in a fillable bio sheet. And then as I went through, like realizing how and how unique each person is, I didn't feel like I could really make a template. But for you, I'm gonna say you should do this. You should make a probate professional bio sheet.

Mm-hmm. , have a head, have a headshot, have your CPE logo or your CPE badge. Any other credentials, summarize your experience. Put a client testimonial on there, and leave at least three client phone numbers for referrals. Perfect. Now this is an accompaniment to you delivering this in person. Ideally, I want you to deliver this in person.

Yeah. Every time you say, every time you hear this. You should say, Oh, that's interesting. If you don't mind sharing with me, which, which law firm are you working with? And the second you have a free moment, go over there, bio sheet in hand, knock on the door, and confidently introduce yourself and say, I just

spoke to one of your clients who told me that this is how you're handling, you know, the, the real estate decisions.

And I wanted to introduce myself. My name's Miriam. I'm a certified probate expert. I'm a friend of the court at my friends and family work in the court, and I've got tons and tons of experience. I'm not applying for a job, but I'm telling you there are professionals you don't know about. Here's a bio. Let me know if you want to grow your firm.

Okay, perfect. But like hit just, you know, face the challenge head on. Yeah. It'll give you, it gives you, And the other thing I would do is proactively approach those firms. There are probably a dozen that are playing at a high level that are representing a lot of people. Just door knock them, take them lunch, do the drop bys, doing that in the West Virginia, drop by works too.

Even, even in high net worth. I was literally shaking and then I just started laughing because I'm like, this has been my biggest fear and that shit is over. Like, I'm gonna take it on now cuz I'm not afraid anymore to confront, basically in a way these people that are taking away my opportunities or the opportunities of my clients to be helped by me.

So, yeah, I'm gonna do that. That's a great idea. Awesome.

## **Probate Objections: You live in a different county, you're too expensive**

One more thing. What if they say, well, you're not working, you don't live in this county. I normally say, Well, as a certified probate specialist, I am specialized in probate and the real estate part, I'm also an expert because I know the market trends.

I do my homework, I do my research, blah, blah, blah. But sometimes people can get away from the fact that I'm not in that county. Do you have anything quickly for that? Yeah, I can only live in one place. I'm licensed in How many counties are in Cal? I don't remember. You said I, I, I can only live in one county, but I can work in any of them.

You know, I mean, my license is a statewide license, but my skill set, my skillset is a regional skill set. So for me to focus on one neighborhood I've been in this too long. I've, I've outgrown where I live. I mean, you, you would accept clients that don't live in your zip code, wouldn't you, Mr. Attorney? Yeah, perfect. I

mean, it's, it's, it's an irrational judgment. Like, it's like you can't work outside of the market where you live? Yeah. And most of us, and pretty much every attorney does exactly, but when it comes to us, it's like, no, they're not qualified. I'm like, How are you qualified? And I've even had so attorneys that say, You're asking for too much money.

Wait, how? Well you're asking for too much money, . It's like, how can you tell me what I'm doing is inappropriate? So it's very, very, So use how questions. Use how questions. Yeah. So when, when somebody says something like that to you, say, you know, help me understand how do you think I should price my service?

Put the onus on them to tell you, chances are they don't have a prepared answer, you'll probably get a smart ass response in which your response can be, Gee, I wonder why there's statutory limitations on how you guys get paid. Yeah. Perfect. Sounds good. Thank you. Yeah. Hey, way to not take it, Miriam. I'm proud of you.

Like keep, keep moving forward and doing good. That's awesome. I appreciate it.

Thank you so much!

## **Closing bank accounts owned by the decedent**

Steve Carney. How are you sir? Good, Chad, how are you? Good. How can we have couple questions for you? First off, Chad, I really would like to see all 6, 7, 240 pounds dark in the doorway of someone who would give you grief or question your integrity! That that'd be worth the price of admission.

Well, maybe one day we'll have, we'll do a Facebook Live and we'll confront some attorneys, right? Or do mobile home clean. No. Yeah, and make sure you're packing. I think that's good too. Hey, all all kidding aside first off, I can relate to the fact I lost my father in June. So I'm now an executor for his account and it's really helping me as I stand up the business.

I just wanna know, have you ever experienced this? I'm trying to close an account at a bank for my dad and we had an appointment and I provided a letter of testament, which listed me I had to go before the judge, make sure everything

was straight, and also a death certificate. So next week rolls around, Hey, what's status of the account being closed?

Well, now they said they wanted the will, which was really a head scratcher. Cause I was like, Okay, you didn't ask me for that first. And secondly, what if the account was intestate? I asked that. I don't know if there's a will you have to provide it. So I've done that. I'm still waiting on a check and it'll be four weeks tomorrow.

I'm just, have you ever heard of someone being asked for a will to close an account after you've provided letters and a death certificate? I think it's probably an internal banking policy. It's, you know, every bank's gonna have their own administrative policies, so I, I would just call and ask to speak with the branch manager.

And you say, What, what would you think is a reasonable amount of time from the date that we close an account till I actually get the distribution? Okay. Well in this case, I've been waiting four weeks. Can you help me get this payment today? And I think you guys owe me a wire. I'm not waiting for a check. But I would just take it to the branch manager and just say, you know, if you need more from me, I need to see written policy.

Otherwise I expect a wire by end of business.

You there, Steve?

## **Probate process when only heir is a minor**

Terry, you're up. You know, just to save time for everybody, I, I wrote down what my question is. Okay. And it's it starts situation intestate. Sure. So the only heir is a minor with no court acknowledged guardian.

Is it acceptable for the attorney to pretend to send out a notice of proposed action for the real estate sale and then wait the 15 days, is that the heir approval or not. See that there's no heirs that have a voice. There's only this one minor. She has no guardian.

And the attorney is just trying to fake it and make it, you know, gimme 15 days and at the end of 15 days we'll just go forward. Well, he already costs us an all cash sale, but he, that's how he's going plan to do the next one. Is he the public

administrator? No, he's the attorney for the pr who is the pr, PR is actually the grandmother of the minor.

And the mother, the mother of the minor was not married to the deceased son. And so the only, he is the granddaughter and she did not have, and this was by design. They they, he, the attorney told the pr Well, it's gonna take three years and \$20,000 to get her a guardian. We can do it without, And so I didn't know this brought in an all cash offer and blew up.

You brought the offer? Yeah. And the, the title company says, Well, if she doesn't have a guardian, we're not gonna issue title insurance. Because the attorney was just trying to put out the notice of proposed action, wait for 15 days for no disapproval. Well, obviously there's nobody to approve or disapprove.

And then after that period of time, just go forward as though we had approval. Having But you're not representing, you're not representing the, you're representing a buyer in this case, not the seller, Is that right? No, I'm representing the pr. Okay. But you, one of your investors also brought a cash offer?

No, it was a second. It wasn't my, it, it wasn't my client. There was a second. A buyer's agent brought it. There's a buyer agent, and I'm representing the pr. I never represent both buyer and seller. Never. Yeah. Good for you. I don't either. You can't ride one horse with two hour, can't ride two horses with one ass.

Yeah, exactly. . But, but what's going on? The attorney is faking and making it, and I think, have you spoken, knew about it, They would put a kabocha on that right away. Right. Have you spoken to numbers? There's no addresses, there's no individuals. There's no way. It seems to complain to the court. This is California, by the way.

Yeah. Are, is your court, are they working virtually or are they back in the courthouse? Far as I'm not, I'm remote. I'm in Arizona. So I wouldn't do me any good, even if I, even if they were not, I don't think they're remote any longer, but I might be able to send somebody else in and I might just hire an attorney and send him, him.

That's what I was thinking. Contact an attorney in that market. What, what county is it in? Orange. Bill Gro, Bill Gross can probably help you out here. I think he, he may be out of town, but you, you might wanna get in touch with

him. The other, Say that name again, please help you. What's, Say, I didn't hear the name.

I'm sorry. Bill Gross could, could probably help out, right? I think he may be out town, but Nina is the next one I would point you to. Nina has good attorney relationships. She's actually in law school herself. She understands the, the local law and she's an advocate of, of family. So, Nina Grayson is, I don't see here today, but she she's a bit of a spitfire.

I think she could help you out, be really valuable to you. Yeah, and Bill, Bill is wonderful too. I, I, he already initiated a call to me on something else and I, I will give him a call later today or tomorrow. Yeah. And be sure and check in State Professional's Mastermind or Probate Mastery alumni. Nina Grayson is is the other person.

Cause Bill is, I think Bill's on, on a vacation. He, he couldn't be here today, so if you can't get ahold of him, it sounds like time is of the essence on this. And I might ask Nina for the help today. Thank you. And Ka also mentioned Renee Kishk, who is also, she's in, in West la. She has attorney relationships too.

And her name is it's r n e e r e n e e k i s c h e. Don't call her Renee Kish, By the way, too many people do that. She's not, she's not an egg pie. She told me. , it's Renee Kish-EE. All right. From one Terry to the next.

## **National Estate Directory and Probate Referrals**

Hey Chad thanks. Hey. Can you speak a little bit more to the the national directory and the status of that and process?

The status is brand new. Today's the first anyone knows about it, but where we're headed with it, we will take right. We have a list of our national CPE referral list that Grant Cox put together about a year and a half ago. It's just lived in Google, like in a Google sheet where people who have bookmarked a link can get to it.

Not a great resource. So we will reach out to everyone on the referral. We will reach out to all the CPEs who have earned their certification. And anyone who's taken the earn course, any of our students, any of our community members can be in the, in the directory. Now, only if you have cleared the Probate Mastery

curriculum and earned a certified Probate expert designation, will you have that badge and that that will be highlighted.

So you'll get a priority ranking within the platform. Over time, we wanna see where it grows. It could be to a point where it's a paid membership for anyone who's, not, credentialed as a certified probate expert, where, you know, vendors want to come in, they have to, you know, they have to clear the bar by being a subscribing member.

So we wanna see what comes in. Like, if we don't have to do any gatekeeping, we don't want to, We'd rather have it be a bigger resource. I mean it's going to be quality over quantity. But if we don't have a quality problem, then it could continue to be a free tool forever and just a place for professionals to network.

If it starts getting jacked up and the quality is not there, then we'll probably put pay gates in place where it will actually be a subscription product.

And as far as like ways for you to benefit from it we are, you know, we'll work with EstateExec. Integrating technology systems isn't always the easiest thing in the world to do, Right? So what we're hoping to do is instead of having you go to EstateExec and basically qualified to be put in manually, when somebody enters our directory, they will also enter the estate exec checklist directory.

If we can integrate everything at that level then we could have, you know, your whole vendor team would be presented within EstateExec and also out on just a general internet to organic traffic. We're trying to, you know, ultimately it's, it's a consumer value piece that if we can make it easier for consumers to find us and our vendor team leading back to us, then it's a good resource for everybody.

Right. So right now it's just wait and see to get the sign up and various things along those. Yeah, right now there's, I mean, several people found it somehow organically. Then McKenna put it in the, in the EARN course, like you heard Bud Thompson finish the course and found that today. We haven't even emailed our members and we already have a couple dozen members in the directory.

So I'm sure as after today's call, we'll have several more. What we're gonna do is we'll send every certified probate expert a notification that they have a profile, and then they will have to accept that profile and come in and then customize it so you can upload your headshot, you know, put your bio in everything.

Basically we're reaching out to the people who are currently in our referral network and who are certified probate experts or EARN students, and they'll be

invited to come back in and edit their own profile. We're not gonna set it up where they're just a little avatar picture and it's full of people who aren't actually active.

If you're not active and you don't accept your profile, you won't be in the directory. Or if you don't proactively, you know, join and create your own profile. Okay, thanks. Yeah,

We're quarter after and I don't see any hands up guys.

So, we'll, we'll wrap it up this week. Been been good to see everybody. So many familiar faces. I'm really proud you guys are all these familiar faces are still here. I see a few new faces, several new faces. Sorry I haven't been around to meet you guys in person. I've been working hard in the background.

So, as always guys, thank you so much for taking time out of your day and your week to be here and contributing and sharing your stories and collective knowledge is always impressive here. But thanks so much for being a part of it and have a great day.

Thanks, Chad! Have a good day.

Thank you. Bye.