

How to get more referrals in real estate: Pete Marck Success Story

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Introducing Pete Marck, Certified Probate Expert

Chad Corbett: Welcome everybody to one of my favorite podcast episodes that we do here at Magnum Opus Project, a customer success story.

So Pete Marck, welcome to the show.

Pete's been with us for quite a while. You've been part of the community. You first started with the Probate Mastery course becoming a CPE.

And most recently, one of the first people to buy, take, and finish, which is something important we're gonna talk about today is taking and finishing the courses that you purchase. He's one of the first early adopters of this. So, I'm excited to kind of jump into his story before Probate Mastery before EARN, and then after both and how 80% of his deal flow is coming from this niche.

So, I think you guys can get a lot of good ideas, and a lot of encouragement. And this is proof that this works even in one of the most competitive markets.

Actually Pete's in the most competitive market I've ever coached probate in. I've coached people in Midtown Manhattan and every major MSA. Colorado has some really specific variables that make it the most competitive probate market in the country. So, he's really good proof that if you work, this works. And I'm really excited to jump into his story. So Pete, thanks for giving us your time today.

Pete Marck: Well, thanks for having me on! It's an honor to talk to you.

Why I chose the probate niche

Chad Corbett: Tell everybody a little bit about how you got, where you are, how you found probate as your niche, and we'll kind of start there as a foundation.

Pete Marck: Well, sure. So, way back in another life, I was in Massachusetts and law enforcement. Then, I moved out here to be with some family. I took on the law enforcement tag again out here for a little while. And then I found it was the same people going through the courthouse that I had picked up on the ambulance as a paramedic.

So I said well, I'm done with this. And I went and joined the family business of real estate. My aunt and uncle been out here since the eighties doing it. You know, you're supposed to start with your sphere of influence. Well, since my relatives were out here doing it, we had the same sphere of influence.

I wasn't about to like steal their clients, you know, just ethically. I had to find my own clients. I got my real estate license in 2018 as everybody knows or should know that it takes a couple of years as a new real estate agent, whether you have a sphere or not, to get going.

Just before the COVID hit, I was starting to pick up business and going, and I had seen this advertisement, "oh, probate, come in. You know, we'll talk to you." I knew it was an upsell situation, but I wanted to go and I figured I was gonna go learn about people that were getting divorced.

Well, it turns out it was talking about probate as in people that have passed. They wanted 700 and some odd dollars for that class and I wasn't about to do that. I did some research. I came across Probate Mastery and I took your class, which is a national class basically. And then I found some other attorneys here that were offering classes, both for continuing education credits and non continuing. And I took all of those that I could find to make it a local thing.

Probate Marketing Results: Referrals vs. Direct Mail

Pete Marck: Yeah, then COVID hit I didn't do anything except that whole summer of COVID I spent building up my referral database.

So now I have a 30 page spreadsheet from A to Z. Almost the X, 1031 exchanges of referral partners. I have that spreadsheet open every day. I've got about 12 attorneys on that spreadsheet, but I've made really good relationships

with about four. And I get referrals probably from three of those on a regular basis. And then once COVID lifted a little bit, we started going and now I'm rolling. And this is my - I mean, out of 10 transactions, eight of them will be probate.

Chad Corbett: That's great. How much of that came from marketing versus referrals?

Like as a percentage, how much of it came from direct mail, phone prospecting?

Pete Marck: I did direct mail when I first started. My very first probate deal did come from direct mail, followed up with a phone call. But that was, that, that was pre COVID. So I did one before COVID and then nothing else from mailings. Nothing from open houses, obviously, nothing. Everything was either: I found the lead myself and I called, or it came from an attorney. So I don't spend any money on mailings anymore because it's just a waste of money, unless I talk to the personal representative first.

Chad Corbett: I wanna point out to anyone who's not in the Colorado market.

Colorado, as I mentioned in the beginning is probably the toughest market I've ever coached in the way the courthouse handles the data, for privacy reasons.

Pete Marck: Yes.

Chad Corbett: They will essentially season the data and release it after the probate has been well into process. Unless you're willing to pay \$5 per record at the courthouse.

In which case, like if you're pulling Denver probate leads, you can spend upwards of \$1,500 a month just to get the list. Every market is becoming more competitive in the mailbox with direct mail. That's one of the big reasons.

And you know, I see the market shifting. I'm quite bearish on where we're headed for the next 36 months in residential real estate. And I know that all the housing data is great and positive, but the macroeconomic data is not and real estate as an asset class is subject to that. So, I've felt like we needed to deliver something that would allow you to actually cut your marketing budget and increase your profitability and not sacrifice deal flow, actually get more transactions.

The EARN course will allow you to, instead of hammer phones and filling the mailbox, you do what Pete's done. You build a professional network and you just enjoy inbound referrals and do what you do best: the dollar productive things. I'm excited to be able to give you guys someone who's getting that result in one of the toughest markets in the country, because if it's working for him in his first couple years of business, and it's working for him in one of the toughest markets in the country, like the investor competition is fierce in the Denver Metro market.

How to increase your real estate referrals after taking EARN.

Chad Corbett: So let's talk about kind of before EARN, how many of those attorney relationships did you have? How did you get them? And when you were taking the course, like, what were your epiphanies and what have you taken action on that you're doing differently now to get more attorney referrals or attorney relationships?

Pete Marck: Well before the EARN class I had made, because I had taken the Probate Mastery and making relationships with the attorneys is part of that. You know, it's touched upon. I started that. I took a couple of days. And I made my list of 30, 40 attorneys.

And I went knocking on doors. I got kicked out of a lot of 'em, you know, because they, oh, here comes another realtor or whatever.

Chad Corbett: Yeah.

Pete Marck: But there were two that welcomed me with open arms and those are the two of 'em that I still do business with. And then after the EARN class, I've expanded that a little bit, but I'm happy with the attorneys that I have already built the relationship with.

So now I'm going to the politicians, city counselors, that sort of route, because they come across a lot of people and if they come across somebody that says, oh my so and so my aunt passed away or whatever, they can, say well, "Hey, call this guy."

One of my referral partners is a fence installer, I hooked him up once with the family up at Thornton and he sent me five referrals.

Estate management software as a probate marketing tool

Pete Marck: With the EARN class, there were a lot of... the biggest thing I took away obviously was the Estate Exec software. I just got a listing Friday in Golden, officially got the contract signed Friday for the listing, and I provided him with the EstateExec and he called me Saturday afternoon.

And he couldn't be more happy with what is included in that .The brother passed away. It's a hoarder house, but he's got a lot of antiques. He's got an MG car that's in the garage in mint condition. Of course it's covered with stuff, but, you know, just for listing all the assets and the information that was on that, he was very thankful that I provided EstateExec for him.

Chad Corbett: That's awesome.

So, part of the EARN - Earn Attorney Referrals Now - course is a software partnership where we can provide you consumer facing software that's \$200, for only \$85. But most importantly, we're providing you the ability to issue a 10 day free license to every single prospect you wanna market to.

So whether you're making phone calls or direct mailing, we provide you with the tools to actually reach out. Moreso, to be one of the first people reaching out, not even to talk about real estate.

Example probate script using a custom probate checklist as your USP (EstateExec Software Tips)

Chad Corbett: " Hey, my name's Chad, we've got a social enterprise here in Denver that helps families going through probate and trust administration. As part of that, we try to reach out to everybody in the very beginning and offer one of the most valuable tools that we have. Here is a paper checklist that'll help you walk through the entire administration, or if you'd rather have an electronic version of this, please call my office. We'll get you set up for free."

They don't even need to know that you're paying a licensing price, just that you get the social credit for providing the software. So. If you haven't taken the

EARN course, inside of the course, there's a letter that's there. The call to action is designed to bring them back to you as the trusted hub of this whole thing.

So yes, the attorney will play a role. Yes, the probate judge, the probate clerk, all those people will play a role, but you wanna present yourself as the hub, the center of this, the probate expert. And then that way you get the first phone call and build the relationship and by introducing them to the fence builder or the attorney, or the CPA, you just get more and more and more social credit.

So Probate Mastery had I think, 13 letters, but EARN is a combination of marketing and software and education, all kind of put together.

The other thing is you can actually, as a student of the EARN course, you can be listed as the local probate expert in that checklist.

And Pete, have you, did you do that with Dan?

Pete Marck: I don't believe I did.

Chad Corbett: Dan the founder and CEO of EstateExec is incredibly excited about the partnership. He's already commented on the quality of the students who have taken the course.

He's never really worked with people like that. If you are a student of EARN, you can email EstateExec support team and request that you be put into the local listings. They have 3,149 county-specific checklists.

So there are nuances. Like if you're in Louisiana, you have a Parish, not a county and everything looks very different. It goes through Chancery court in Tennessee... So they have actually done the work to go through the entire country, document all the nuances, and make that into their probate checklist. So you can trust that when one of your prospects says I'm in Arizona, I'm in Yuma county, that probate checklist is specific to Yuma county, Arizona.

But to take that further. If you're an EARN student, they will put you in the probate checklist. Like on week two, it will say, " take advantage of a free conversation with the Denver County probate expert."

Because of the level of professionalism they have seen from our students, they're actually willing to put you into the checklist as the local probate expert.

So even if you're not marketing, even if a family just blindly finds the retail version of their software, or they might sign up for EstateExec when they get to that point in the checklist, it's gonna pull up a checklist item that says, Hey, you need to call Pete Marck. He's the local probate expert in Denver. Let him go through and do kind of do an audit, make sure you have everything you need and you get an inbound phone call with a family who needs help. And we know there's an 83% chance they own real estate, so it's likely you'll monetize that.

And then beyond that, we've got some more interesting news. So we were independently building EstateProfessional.org, which is a national directory. And we're looking at actually integrating that into the EstateExec software so you can, behind a password, you can put your vendors into that platform and they can get built into the checklist.

So in week one, you can say, " here's our preferred Denver CPA. He can help you get your EIN and prepare to file the last tax return. Here's our preferred estate sale company."

And then we're literally all on the same page. We can all be looking at the list of assets, the list of liabilities, the dates. We're all really working as a vertically integrated team. So that's kind of the next phase of this.

Everyone's gonna benefit from integrating these pieces that have been fragmented forever. So we're, we're tying together the real estate professional, the attorney, paper tools as well as software tools, to kind of tighten this up and make it more efficient for everybody.

Building a client referral pipeline with "junk leads"

Pete Marck: I got a referral from one of my other attorneys. I've never gotten a real estate deal from her, but this family needed a broker price opinion. So I went up and I dropped what I was doing. And did that, got it for. Sent her a few referrals in the meantime, but last Thursday, she called me up in tears.

Because something had happened, somebody dropped the ball somewhere. So I was on the phone with her for an hour and 15 minutes solving her problems. And now, you know, she told me she's been so thankful that you know, her has a Bed and Breakfast business, AirBNB, that he's buying properties now.

And she says, "we're going to use you as our real estate expert!" Because she had a real problem. The attorney was gonna write the contract. And I told her, I'm like, I have a solution for you. We can solve this in an hour, down at my office, but you know, talk to the attorney, see what, what happens.

So, you know, I didn't get that sale, which is fine, but I'll get anybody she talks to that's gonna sell a house or needs to buy a house.

Chad Corbett: Yeah. And I think that's a hard thing for a lot of people to accept. They're like, oh, that was a junk lead or a junk referral. And if you have the right mindset in this, and I'm really proud of you and how you've embraced what we teach.

Like if you have the right mindset. I mean, I know one lady who got 13 listings from one family who didn't have a house to sell. I know there was another guy who got a commercial real estate out parcel in Northern Virginia, a trailer park in Florida, and then some swamp land, like some crappy Florida land.

But all of that was from helping one guy whose father had a mobile home that he didn't even own, he leased. So the people who are just cold calling and just shooting for the jugular, just trying to have a real estate conversation, you're literally stepping over multi-thousand dollars checks to try to get to the next lead because you won't slow down and actually be benevolent and say, how can I help this person?

Provide value first and talk to everybody. Focus on people and situation and you'll never be chasing deals for the rest of your career because these stories come out every time you help someone, you become the expert. And the next time they have a real estate need, you're the first person they think of.

So if anyone who's stepping away from leads and saying, well, that was a junk lead or you know, that person wasted my time. I'll challenge you, that you probably have left thousands and thousands of dollars on the table. And you're not even aware of it. Just help everyone you can. And you never know where your next referral's coming from.

I mean, this guy, if he's, if he's doing Airbnb at scale in the Denver market, it could be, he could be buying 10 houses a year from you! So good for you.

Thank you.

EARN Probate Course Reviews: Should I take Probate Mastery vs. EARN?

Chad Corbett: I'm curious, so the whole first part of the course was mainly for context, so people could understand just how damn challenging it is to be an estate attorney. The biggest reason, 46% of Americans or less have a will is because culturally, we don't want to talk about our death. We don't want to have a plan.

So they have an incredibly hard customer base to deal with already, if they wanna be in planning, especially. But the whole first part of this was here's why it's so tough to be an attorney. The whole second part is what are all the ways we can really bring value to them and bring them our best referrals.

And then we had a few marketing ideas: we had the customizable no trespassing sign, which is a way for us to connect with the petitioners sooner. But I'm curious, like what other things really stood out to you? Like, especially having experience under your belt, doing probate deals, what did you learn that surprised you?

Pete Marck: Well, forgive me. What's the attorney's name, from California? I forgot his name.

Chad Corbett: John Fraker.

Pete Marck: Yes. Just his stuff alone was worth the price of the course [laughs].

Chad Corbett: Yeah!

Pete Marck: You know, how he talks about what he's done. I mean, he's like a one man show, right? One man office. So what he shared as far as how he handles things as an attorney and how he deals with people, that sort of thing was what I took out of the class, the most... hearing right from the attorneys.

I concentrated more on what the attorneys were saying, what would turn somebody off when you walk into the office, versus: okay, this is what we really need, what would help us, what would take that administrative burden off. That sort of thing. But Fraker is awesome!

Chad Corbett: That's that's great to know. I mean, I asked a lot of very busy attorneys to be co-instructors in a course. I thought that might blow up in my face.

I'm glad you got a lot from that format.

I really enjoyed doing it. Co-producing a course is way more fun than standing here, beating yourself up, making yourself do it alone, right? It was actually really fun to have, you know, both our successful practitioners, like our real estate professionals, as well as the attorneys that have become part of our community and we all kind of teach together. It was a lot more fun that way.

What would you say to someone who might be - well, I'll give you two different things: someone who has never dealt with probate, but somehow has found this video and they're, they're thinking about the probate niche. You know, we see a lot of people join our community. They heard about the probate niche and they're just dipping their toe in, what would you say to that person? And then what would you also say to the person who thinks that, ah, hell what I learned in Probate Mastery, you know, Chad covered building a referral network in session two, I don't need that. Like, what's your advice to the folks watching?

Pete Marck: So like I said earlier, the probate mastery and everything is more of a national course, you know, it teaches the ins and outs of probate, how it operates over the majority of the country. So I would, I would recommend take the probate mastery class and then do what it says: build that referral network.

In my brokerage, we have a Facebook page and, you know, even in real estate school, they tell you, get your referrals under wrap so you have a referral base. And I can't tell you the amount of, it's almost daily, that there are people, real estate agents on that Facebook group saying, "Hey, I need a electrician. Does anybody have one?" I used to put stuff up there, but now I'm like, you know what? You need to get your own damn stuff. I've spent time, and I've had people ask me for my spreadsheet and I'm like, no, I'm not giving you my spreadsheet to fill that. [Both laugh]

So, do what it says in the probate mastery class, because that's like an orientation class basically.

And then find a local attorney, that is teaching probate or something along those lines so that you learn the ins and outs of your local probate system, your local court system. And then you add the real estate into that. And then it's just after

that, it's just about helping people. So with, I mean, do what the course teaches you and asks of you to do.

And I think the, the referral having your referral partners is one of the biggest steps because you are gonna need it, whether it's probate or not.

Chad Corbett: Yeah, having taken both courses. Do you think that someone could come in and not have any experience in probate? Take the EARN course and actually hit the ground,, and be able to build a probate business?

Or do you think that you need to work with the personal representatives first and kind of get the experience before you go putting yourself out there to attorneys? What's your advice to someone.

Pete Marck: I think, I think it depends on the person, the personality. You know, you and I both have backgrounds where we're used to going in and " hi, how you doing" type of thing and being thrust in a situation versus going in and "hi, my name's Pete, and I'm a probate special, and I'm..." You have to be sure of yourself and what you can do and what you can provide, because if you're not, they're gonna read that right away and they're gonna be like, goodbye.

You know? So if your self confidence is up there and you've done the training and you've gone through all this, and you've done research on your own and looked stuff up, you're gonna be very confident. If you can do that and walk into an attorney's office, they put their pants on the same way that you and I put one leg at a time.

They're not any different than us. And some people are intimidated by attorneys, let's face it. It doesn't bother me at all, but you know, the guy next door might be like, holy crap, you know, he, he makes \$2 million a year and here I am as a little real estate agent just starting out. But knowledge is power.

And if you have the knowledge, don't be afraid to do that.

Co-Hosting a radio show with attorneys & more contact info

Chad Corbett: Yep. Well, awesome! If people wanna reach out to you, I mean, other than a member of probate mastery alumni, which is a private group for CPEs only, the other places are general community, which is a state professionals mastermind.

Any other ways you'd like to share that people can get in touch with you?

Pete Marck: Yeah, if they wanna get in touch with me. PeteMarck.com, petemarck@gmail.com, 7 2 0 2 0 3 8 8 1 2. And then I do have a website it's called frontrangehomes.net

And, anybody that's in the Denver market sat Saturday, the 25th, I'm gonna be on ESPN radio at 7:00 AM. It's a tape show. So we're taping it on Thursday, but I'm gonna have a probate attorney on the show with us, and we're gonna talk about probate. So that's amazing 1600 on the AM dial. ESPN radio in Denver, tune in.

Chad Corbett: And this is the, is it the second time you've done the show?

Pete Marck: Yeah. Yep. This is the second. The first time I did it just by myself. And you know, I had to say, I don't know, every 10 minutes, I'm not an attorney, like what Bill says all the time. Bill Gross says I can only share my experiences, right.

So that's pretty much what I did. Now. I'm bringing an attorney on so she can answer questions, legal questions, and I can stick with the probate and the real estate.

Chad Corbett: So you invited the attorney, provide value first, right? You invited one of your probate attorneys in, which will give them even more credibility and more exposure.

Pete Marck: That's what, that's how I sold it to her. Because she, so this attorney's firm, this is one of the first attorneys that I walked into and he and I had a similar situation having to do with our families and probate. So we really connected and he had just started his probate business and I asked him how much he did in probate.

And he said, not that much, but that's an area that I'm looking to do. And this is just before COVID. So after COVID he brought this other attorney on, so he just specializes in doing the estate planning side of it with the trust and the wills and everything. And then she handles the actual probate.

So I've worked with her on several deals. But they're still trying to grow that probate business. So I said, Hey, you know, it's a great marketing opportunity, it's credibility. It gives you immediate credibility and gives you, I don't know how many people listen at seven o'clock on a Saturday morning to real estate,

but there are some, and you know, you get a recording of the show, whatever to put on your social media.

Chad Corbett: That's Nice. I don't know if you ever connected with Rodger Lecy. Rodger was one of the first people to take probate mastery back in like 2013, 2014. He does a radio show in Northwest Arkansas. And you may wanna connect with Rodger so you guys can cross pollinate and share some ideas.

He's been doing it for a couple of years. And he's in estate professionals mastermind and probate mastery alumni if you wanna connect with him in there. But uh, he's got quite a bit of experience under his belt now, so he might be able to help you, you know, if you, if you have an ongoing opportunity.

Pete Marck: I did purchase the zoom package and I'm gonna basically copy Bill in California, the LA probate expert, and interview my referral partners and start that community group. *You just have to, I mean, you lay everything out in the class.*

It's up to the individual to actually do it. And you know, I had a supervisor in the air force and he was chewing some, guy, well, he was chewing all of us out, but he said, look, it's like going grocery shopping. You take something that you want to off the shelf. You put it in your cart, you take it home, you use it. You come back to shopping again, you decide to take it off the shelf again. You might go a couple more aisles, then you decide you don't want it. You take that out and you put it back on the. It's the same thing. That's kind of how I'd done my own training too, is I've taken in your class. I listen to Bill and the other people in probate mastery and I take bits and pieces and I put together what works for me, but you have to do it.

You can't just take the class, take the test and, oh, I'm a probate expert that doesn't work [laughs].

Yeah.

Chad Corbett: Well, listen, thank you so much for sharing your advice and your experience and for being a valuable part of our community. Like I said, I look forward to future interviews. I really want to, I'd like to have you come back as soon as you get your Facebook community off the ground. And your vendors realize how much value it is to be an admin in a group like you're putting together. So I really look forward to if you don't mind letting the community have visibility into that. Sure. Kinda showing, showing how you built that.

So let's do that next.

Pete Marck: *That sounds great. Thanks for having me. It's you know, like I said at the beginning, before we started taping, if it wasn't for probate mastery, I wouldn't really have any referrals but you put it all together for everybody. And that's great. Thank you.*

Chad Corbett: That does my heart good. I'm glad we can help. And I look forward to helping you continue to grow through your career. So thanks so much for being here today, Pete, and for your time and for everybody else, if you haven't taken these courses and you want 80% of your business to be inbound, be sure to check out these courses and our communities, you can start for free by going estate professionals mastermind, go to probatemastery.com, subscribe to the podcast, start learning from these folks.

We have lots of people like Pete and the community that are generous and willing to give up their best secrets. We're very much culturally, you know, a rising tide lifts all boats, and we don't have poison pens in our community. Everyone's supportive, not destructive. So if you've never done a probate deal and you're curious, you've got an amazing group of individuals like Pete, over 5,000 people in estate professionals mastermind.

Come see us. See this might be for you. And if you decide it is I would say jump into these courses and you'll have even more access to people like Pete who are certified probate experts. But thanks everybody for watching! Pete, thank you for your time, and have a great day!