

ESTATE PLANNING SWIPE FILE



trust&will

SWIPE FILE

Try out some of our high performing Estate Planning content



WHY ESTATE PLANNING?

Deepen Relationships

Estate planning conversations add value for your clients, and open a natural, low-pressure path to talk about held-away assets.

Stay Competitive

Most of your clients will need estate planning at some point. The last place you want them to find that is with another advisor.

Drive Referrals

When clients finally finish their will or trust, they bring it up in conversations with friends and family - and mention the advisor who helped them do it.

HOW TO USE A SWIPE FILE

This swipe file gives you a few high-performing examples from our estate planning campaigns — two emails and two social posts.

Here's how to get the most from it:

- **Make it yours.** Edit the copy so it matches your brand and voice, then send it directly to your audience.
- **Stay consistent.** Use these pieces to spark conversations, but don't stop there. The best results come from ongoing, multi-touch communication.
- **Think bigger.** These are single steps from much larger, multi-channel campaigns. They work on their own, but the real power comes when you run the full sequence that nurtures prospects, builds trust, and drives action.

This swipe file is your quick-start toolkit. When you're ready for the complete growth engine, that's what Snappy Kraken campaigns are built to deliver.

WHAT GOES INTO A HIGH PERFORMING MARKETING CAMPAIGN?

See how our team of writers and designers build award-winning campaigns from scratch.



EMAIL SWIPES

Emails:
**Personalized and
Persuasive**

**Each email is written to educate
while nudging toward action.**

1

The tone is empathetic and human, helping retirees feel understood instead of sold to.

2

Every message closes with a clear CTA to download the guide or book an appointment.

Email Swipe #1:



Hi Jane,
I talk to a lot of clients who have questions about estate planning.
So I wanted to check in... do you have any questions about creating or updating your legacy strategies? Many people are unsure how to get started. The right legacy strategy gives your loved ones a roadmap to your wishes while paying Uncle Sam as little as possible.
I realize it's easy to put this off. Maybe you created your legacy plan years ago (and think you're good to go) or maybe it's not urgent.
But you've got a limited window of opportunity (just until Dec. 31, 2025, or maybe sooner) to take advantage of the opportunities introduced by new laws.
Remember, delaying your next steps for too long can lead to unpleasant surprises, like accidentally disinherit your spouse or leaving your heirs with a big tax bill.
My team and I are here and ready to help you review your existing strategies or help you start from scratch. We can meet in person or speak over the phone in complete confidence to get started.
Simply reply to this email or call my office at (267) 701-2453.
You can also [click here to get started with your complimentary 1-on-1 Legacy Review.](#)

To your legacy,

Your Name Here
Company
(888)888-8888
<http://hello.com>

P.S. Questions? Simply "reply" to this email and I'll personally respond at my earliest convenience. You can also [use this link to request a call back.](#)

Email Swipe #2



Hi Jane,

Would you still like help creating or updating your legacy plan in light of recent law changes?

Sincerely,

Your Name Here
Company
(888)888-8888
<http://hello.com>

P.S. You can also [click here](#) or call my office at (888) 888-8888 to set up your complimentary 1-on-1 Legacy Review.

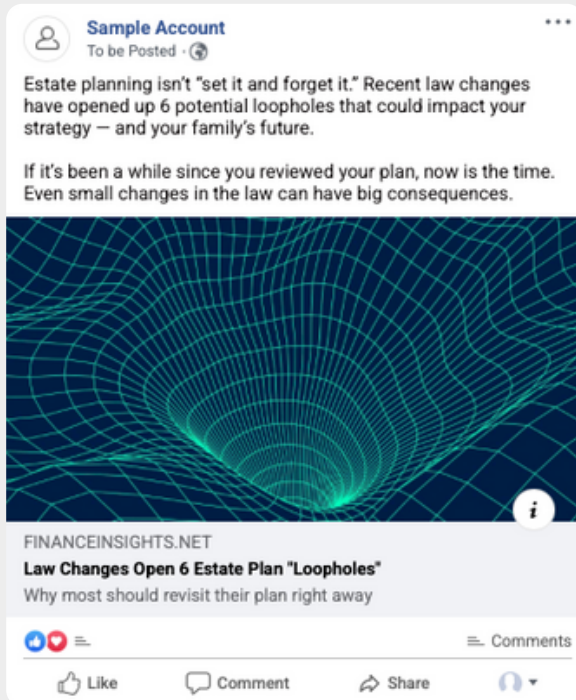
Note: this email is short, but that is part of what makes it so powerful. It's fast to read, and easy to respond to with a quick "yes, I would."

You can send this to larger audiences, but it is most effective as a segmented email send - to people who you know are interested in estate planning, because they've engaged with estate planning content in the past.

SOCIAL POST SWIPES

Social Posts: Designed To Stop The Scroll

Social posts are visually striking and tightly aligned with the campaigns central theme.



Social Post Swipe #1:

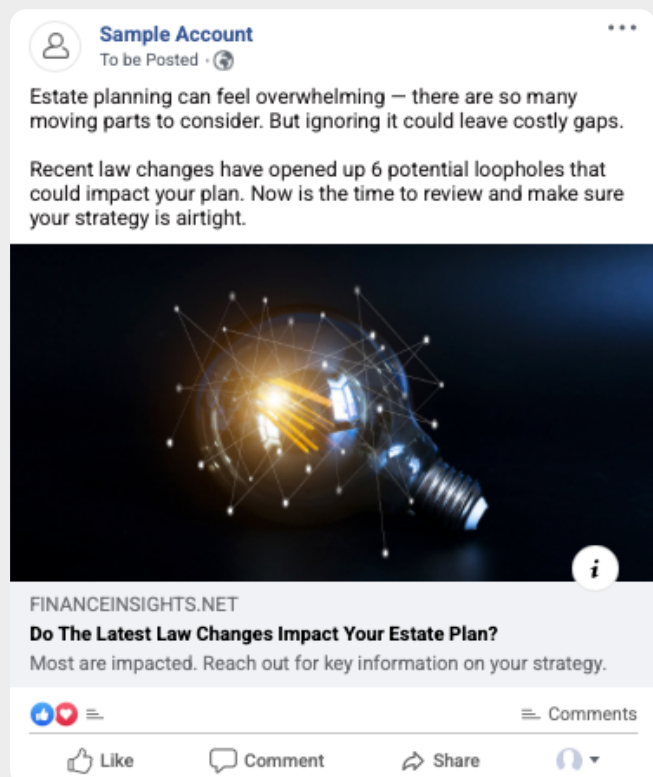
This post is short, clear, and action-oriented. It creates urgency by showing estate planning isn't "set and forget," and highlights timely law changes that could impact the right strategy.

Lastly, it ties the topic to protecting family. This is written to drive awareness as part of a larger campaign strategy, but you could add a specific call-to-action to reach out to you directly for more information, or a free consultation.

Social Post Swipe #2:

This post works because it validates how overwhelming estate planning can feel, which builds empathy and trust with readers. By pairing that acknowledgment with timely law changes, it frames the advisor as the steady hand who can cut through the noise.

It's designed to spark curiosity and encourage clicks for more detail, but you could also adapt it to highlight how your process makes estate planning simpler and more approachable.



READY TO GROW WITH ESTATE PLANNING?

Estate planning isn't just about documents — it's a conversation that deepens client trust, uncovers hidden assets, and sparks referrals that can fuel lasting growth. **The data is clear: advisors who embrace estate planning see stronger retention, more introductions, and measurable increases in AUM.**

If you're ready to turn estate planning into a growth engine for your practice, let's talk. Book time with Trust & Will and Snappy Kraken to see how we can help you make these conversations easier to start, simpler to market, and more impactful for your clients.

LEARN MORE ABOUT TRUST & WILL

Trust & Will is the leading digital estate planning platform, trusted by 1M+ families and 20K+ advisors. Scan the QR code to book a free strategy session and learn how estate planning can drive growth for your practice.



trustandwill.com/advisors

LEARN MORE ABOUT SNAPPY KRAKEN



Drive more estate planning conversations and market your firm with automation + content for financial advisors.

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