How to Start an Estate Planning Practice
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Estate planning in the United States evolved from English, European, and Middle Eastern traditions. During Biblical times, custom required people to leave property to their first born. Centuries later in Greek and Roman times, decedents could transfer property to other people. Estate planning remained mostly unwritten until the Middle Ages when Roman Emperor Justinian adopted a law requiring written wills. English statutes enacted during the Post-Medieval Period maintained the necessity for written wills. In modern times, written estate plans are still essential for individuals wanting to distribute property to family, friends, and others of their choosing.

The Coronavirus situation forced us to consider our mortality. Lawyers can take advantage of this heightened sense of mortality by reminding clients to create or update estate plans. The benefits of an estate practice include appreciative clients, easy referrals, growing demand, and a harmonious work-life balance. Use the following tips and resources to start an estate practice or expand an existing one.

Competing for Clients
Attract clients by networking with accountants, insurance professionals, and wealth planners. Communicate your availability by writing articles for local newspapers and making presentations to clubs, religious groups, and other organizations. Add content to your website explaining how your services fit the estate planning needs of clients. Consider focusing on an affinity group like elderly, young parents, or veterans.

Developing Forms
Develop a forms library using print and online sources. Use Microsoft 365, Google G Suite, or drafting software to automate document assembly. Check bar association websites for forms and publications for estate planning.

Gaining Expertise
Gain expertise by pursuing a graduate degree in estate planning, attending seminars, and reading treatises. Stay current by attending CLE courses and becoming active in bar committees, discussion groups, and estate planning councils. Join the ABA's Section on Real Property, Trust, and Estate Law. Become a member of your state bar’s committee on estate planning.

Safeguarding Data and Documents
Offer to keep documents in safekeeping for clients. State your document retention policy in your engagement letter. Give clients instructions about accessing, updating, and making their documents available. Invite clients to make an appointment for an annual checkup. Encourage clients to give a trusted friend or family member important data like burial instructions and location of wills.

Scope of Services
Considering expanding the scope of your services beyond estate planning to include elder abuse, estate administration, guardianship, legal checkups, long-term care, Medicare/Medicaid, and trusteeships. Safeguard client well-being by counseling them and their family about preventive law.

Virtual Lawyering
Distinguish yourself from other firms by being available for virtual consultations, e-signing, and notarizing documents. Most states have adopted laws allowing online signing and notarizing.

Conclusion
The Coronavirus situation gave an unexpected boost to estate practices. Take advantage of this opportunity to grow your practice. Market estate planning services to existing clients and prospective ones. Use the resources mentioned in this article to develop your practice and enhance your reputation as an estate planner.

Articles
Checklist for an Elder Friendly Office, ABA Commission on Law and Aging, Jun. 1, 2017.
How to Grow an Estate Planning Law Firm, Law.co, Sep. 23, 2024
Five Smart Ways to Market Your Estate Planning Services, Informa, Sep. 14, 2017
Drafting Wills and Trust Agreements, Informa, Mar 16, 2011.
What is Elder Law, Voice of Experience, Aug. 27, 2019.

Associations
NAELA (National Academy of Elder Law Attorneys
NAEP (National Association of Estate Planning Council)

Books
A Guide to my History, Financial Plans, and Final Wishes, ABA Book Publishing, Apr. 29, 2022.
A Lawyers Guide to Elder Law with Forms, ABA Book Publishing, Jan 27, 2020.
Ethics in the Practice of Elder Law, ABA Book Publishing, Dec. 28, 2012.
Working with Aging Clients, ABA Book Publishing, Apr. 7, 2016.
Mastering Elder Law, 3rd Ed., Carolina Academic Press, Jan. 1, 2025.

Forms
ABA (Estate Planning Library)
Justia (Wills, Guardianships, Healthcare)
State Bar (Form Archives)

Videos
ABA (Webinars)
ALI (Webinars)

Websites
ABA (Aging Resources)
ELJ (Elder Law Journal)
Justia (Estate Planning)
NCOA (National Council on Aging)