

## Why is a Good Estate Planning Result so Hard to Achieve?

Prior Inheritance Experience	Relations With Children/ In-Laws/Descendants	Attitude toward Wealth
Attitude toward Death	Mental & Physical Health	Other Life Experiences

Inner Child Issues

Siblings / Parents

Personality Type



**Client**

**Advisor**

**Advisor**

**Loved Ones,  
Intended  
Beneficiaries,  
Others**

Distrust / Fear of Advisors/

Fear of Loss of Control of  
Planning Process

Listening / Communication Skills

Fear of Costs

Feelings about Taxes

Dislike/Fear of Death  
Talk/Thoughts

Dislike/Fear of Death Talk/Thoughts  
Ethical Constraints

Listening / Communication Skills

Limitations / Teachings/Philosophy of  
Particular Specialty

Fear of Lawsuit

Need for Business

“Lead Dog” Syndrome

Self Interest

Fear of Collection of Fees

Listening / Communication Skills

Fear of Loss of Person

Self Interest

Not getting whole story

**Good Estate Planning Result**