



# Will Power

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## BE A PARTNER, NOT A CLIENT

Which is greater – theoretical knowledge or practical experience? Which are truer, more useful, more important? Or are both necessary?. Let me illustrate what I mean by example.

Four people are waiting to visit with the attorney in his waiting room. “This is my life” Client #1 states. “Just because the guy has a diploma hanging on the wall doesn’t mean that I am going to blindly follow his instructions. I’m going to do my own research. I’m not doing or signing anything until I’m convinced what he recommends is the right way to go.”

“Let’s face it,” counters Client #2. “It may be my life and my assets, but right now, the guy behind that door knows more about estate planning than I do. I’m going to educate myself about my choices, but that will take time. Until I acquire that knowledge, I’m best off following the lawyer’s instructions.”

“The guy behind the door spent eight years studying to be a CPA and a lawyer,” opines Client #3, “and another seventeen years counseling people who are worried about protecting their estates. You think that you or I can acquire that kind of knowledge googling on the internet? I’d just be wasting my time. I’m going to follow his instructions and leave the thinking to him. That’s his job!”

Those are three ways to look at approaching an issue that is challenging, mentally exhausting and perhaps a bit daunting. But perhaps there is a fourth way. Client #4 speaks up.

“Client #3 is right – no matter how much I research and educate myself, the attorney will still know more than me. So I intend to listen to him, certainly now when I know next to nothing, and also later, after I’ve learned all that I can.”

Client #2 interjects, “but if you are going to follow his advice anyway, why bother to study and learn? What is the point?”

“Because, like Client#1 says, “this is my life. I want, and I need to understand what I am doing and why I am doing it...”

“So it’s just to make you feel better about the fact that you are following the advice of the attorney?”

Client #3 asks.

“It’s not just that. The attorney needs me as an active partner in my planning. He needs me to be asking the right questions, raising the right objections, even offering my own ideas; he needs me to report to him how my family will react to the planning, or my own circumstances he may not know of, none of which I could properly do if I did not understand, as best as I could, why he is telling me what to do.”

This is an important lesson for anyone engaged in estate and wealth preservation planning. Don’t be a passive onlooker. Become an active participant in your planning. The result will be infinitely better.

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