*1:15-2:15 pm* **Best Practices for Professional Team Collaboration**

CPA: David Green, CPA, PLLC

Trust Officer: Andy Hastings, JD, LLM, AEP ®

Life Underwriter: Paul Viren, CLU ®  ChFC ®  AEP ®

Planned Giving Officer: Theresa Boyer, MBA, CSPG

Financial Advisor: Loran F. Graham, CFP ® , CPA, CKA ®

Questions for the Panelists 5/20/25

1:15-1:20: Introduction of Panelists (Jennifer Hicks)

1:20-2:00: Each presenter will have up to 5 minutes to talk about the unique challenges that you face from your own professional regulations, how you develop plans with and for a mutual client, or anything else that you think is important for the participants to know relating to working in concert with other professionals for the benefit of clients.

Then we will go to Q & A.

Moderator- Jennifer Hicks, CFRE, CAP®

Here are some potential topics/questions-

Setting the Stage & Defining the "Why":

* Why is a collaborative team approach so crucial in effective estate planning for clients today? What are the potential pitfalls of professionals working in silos?
* From your perspective, what are the unique strengths and contributions each discipline (Attorney, Financial Advisor, CPA) brings to the estate planning team?
* Can you share an example of a time when a collaborative team approach significantly improved the outcome for a client compared to what might have happened otherwise?
* What are some of the common misconceptions professionals might have about the roles and responsibilities of their counterparts on the estate planning team?

Navigating Collaboration & Communication:

* What are some best practices for initiating and maintaining effective communication among team members? What tools or strategies do you find most helpful?
* How do you navigate differing professional opinions or approaches within the team while still prioritizing the client's best interests?
* How do you define the scope of each professional's involvement in a specific estate planning case to avoid overlap or gaps in service?
* What strategies can be implemented to ensure seamless information sharing and avoid the client feeling like they are repeating information to multiple advisors?
* How do you handle situations where one team member identifies a potential issue or opportunity that falls outside their direct area of expertise?

Addressing Challenges & Building Trust:

* What are some of the biggest challenges you've encountered when working in a multidisciplinary estate planning team? How were these challenges overcome?
* How do you build and maintain trust and mutual respect among team members, especially when working with new or less familiar professionals?
* How do you address potential conflicts of interest that might arise when multiple professionals are advising the same client?
* What role does clear documentation and record-keeping play in fostering effective teamwork and minimizing misunderstandings?

Looking Ahead & Best Practices:

* What advice would you give to professionals who are new to working in a collaborative estate planning team?
* How can professional organizations like the Spokane Estate Planning Council foster greater collaboration and understanding among different disciplines?
* Are there any emerging trends or changes in the estate planning landscape that make a team-based approach even more critical?
* What are some key takeaways or "golden rules" for successful collaboration in estate planning?

Bonus/Client-Focused Questions:

* How can professionals effectively communicate the benefits of a team approach to their clients?
* What questions should clients ask their advisors to ensure a collaborative approach is being utilized?