



**Elder Ministries Catholic Charities Diocese of** 

Charlotte

### **PRESENTS**

# "DON'T LET THE GOVERNMENT TAKE YOUR DIAMONDS"

# THE POWER OF ESTATE PLANNING

## HOW TO PLAN WITH THE END IN MIND CONVERSATIONS | ORGANIZATION | PLANNING

This presentation is all about what an amazing gift estate planning is and how to remove the fear that cripples so many from giving such an amazing gift to a family.

Most gifts are simply given and then received and it is over. Estate Planning is one of the only gifts that the giver needs to prepare the receiver to receive so the gift can facilitate its purpose.

I show you how to do it all through conversations, organization, and proper planning, to remove the fear. Fear is a roadblock. If you don't understand how to remove this roadblock that is holding you back, you will never plan. This will financially and emotionally burden your family.

- What is Estate Planning truly all about? The strongholds that keep people stuck
- How to overcome the initial fear in order to clear the way to create the plan?
- The 5 documents that are needed in order to have a proper estate plan?
- What are the dangers to you and your family if you do not plan?
- Why do you need to care about your assets and how they are owned?
- Why do you need to be organized for your plan to work as intended? How are you putting your family at risk when you are disorganized?
- 3 Steps on how to have the hard conversations?
   What burden and heartache will you put on your family if you don't have these conversations?

### ADDITIONAL PRESENTATIONS

YOU CAN HEAL
you just need a plan

YOUR PRESCRIPTION FOR
SUCCESS
The Struggle

RE-INVENT YOUR
RELATIONSHIPS
do you know their
family secrets

#### **GRIEF | LOSS | DIVORCE**

Mental health professionals have long agreed that the grief we experience after the loss of a loved one mirrors the grief people experience after they are divorced.

#### **Speaking Points:**

- Empower yourself to take control of your future after devastating events
- How do you begin to organize your financial life?
- What you must know about your assets
- Navigating a new phase of life with confidence
- The first 5 steps to take after a loss
- What Estate Planning documents are a must-have and what are the dangers if you don't address them immediately?

#### Takeaway message:

Divorce or the death of a loved one doesn't change everything legally unless you have the right documents in place. If you don't plan for the future, unfortunately, the government will make your decisions for you. Avoid the traps and design your future.

### FAILURE MAKES YOU STRONGER

Trials and tribulations happen to everyone but how resilient you are when faced with unexpected struggles determines one's success.

#### **Speaking Points:**

- What to do when your circumstances say no to your future vision
- Challenges are not permanent roadblocks
- When people tell you that you can't have what you're dreaming about
- The 2 types of people that rise above the struggle
- How to rise above the naysayers and succeed
- Don't let others determine where the stop sign should be

#### Takeaway message:

What happens when there is no direct road to anything you are striving for and face setbacks? There is no choice to give up! Learn how to pivot but you can't give up! You can thrive through the pain.

#### The TRUST Factor

Relationships, Relationships, Relationships Developing trust with your clients is the #1 priority. Learn more effective ways to build trust with every client.

#### **Speaking Points:**

- How to know when you have built trust with a client
- 4 steps to building stronger relationships
- Ways to get your clients to share their "diary secrets"
- How structure to your friendships leads to being a better friend.
- The right questions to ask that cultivate multiple generational relationships
- How to stop one directional relationships

#### Takeaway message:

Learn how to have your clients trust you enough to want to share their secrets with you! How to make, invest and cultivate relationships.

"Planning today for your family's tomorrow."
-SABRINA WINTERS

## SABRINAWINTERS

#### THE BUSINESS WOMAN

Sabrina Winters, Attorney at Law, PLLC was founded in 2005. Since then she has exceeded her yearly net sales year after year and has grown her team with the primary focus always being on client experience. Among her many awards recognizing her success as a woman in business include Top 10 Estate Planning Attorney and one of the 50 Most Influential Women. Sabrina advises and consults with individuals and corporations on the intricate and detailed processes of Estate Planning and assists families with settling the estates of loved ones who have passed away.

#### THE SPEAKER

Sabrina Winters, Attorney at Law, PLLC is a professional speaker that loves to educate, entertain and empower professionals to organize their futures and be prepared for the unexpected! Get inspired by her success! The road to success was not a straight line but that is where she shares the gems of how she persevered and came out a winner!

#### THE AUTHOR

Sabrina was commissioned to write a book for Lexis/Nexis, universally known throughout the legal community for legal research. In it, Sabrina shares her step-by-step processes on how she creates relationships with her estate planning clients which lead to long-term relationships and inspire clients to refer her services.

#### THE PERSON

Sabrina grew up on Long Island, New York, and currently resides in Waxhaw, North Carolina. She received her bachelor's degree from the State University of New York in Stony Brook and her Juris Doctorate from Thomas M. Cooley Law School in Michigan. She is a wife to Tim, and a proud mother to her daughter, Kailey. She enjoys spending time with her family. Sabrina has a passion for sharing her personal story and loves to continually improve herself. Whether she is speaking at an event, helping clients with their estate planning, or enjoying family time, she always looks for ways to help her community.



# A Speaker Who is an esteemed professional in her field



"Sabrina took care of my situation at a very fragile time in my life. It was an emotional process for me and she handled it like a gem. She took care of my needs and made sure that my son and I had security. Her pricing is very reasonable related to the value and expertise she offers. We have now become friends and I feel safe with my trust and will in her care. Updated in 2023, I have seen tremendous growth in Sabrina's firm. I had to redo my will and she made it SO EASY and efficient. Also, I have seen her speak and she is a powerful educator in this space. Anyone would be lucky to have her speak for their organization."



"I met Sabrina for the first time at a Death and Dying Seminar at one of the largest churches east of the Mississippi. She presented the importance of having your affairs in order, the processes involved, and dealing with the after-death issues that many are not familiar with. Sabrina speaks with great clarity, and confidence and quickly gains the trust of all those in attendance. I personally learned about the laws in North Carolina and was able to use much of the information with dealing with families in my own husiness "





"Sabrina Winters is a confident and engaging speaker. She is very focused, prepared, and extremely organized. Sabrina captivates her audience with her knowledge and understanding of the material that she covers without overwhelming them with too much information. The time and effort that Sabrina puts into each presentation is evident...the PowerPoint slides and the real-life stories definitely complement her delivery style. Sabrina is awesome to work with!!"

She has been and will continue to be a great source of information both in person during her speaking engagements as well as in her videos on various subjects. I highly recommend Sabrina!

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