

# How to Tell Your Procrastinating Clients That It's Time to Get Off the Dime...

by Rick Harmon

It's pretty darn hard to be a hero when your client drags their feet!

Let's face it: some clients get put on the back burner, languishing, just because they're stuck...stalled...or they've flown off the radar (or worse). You've tried poking... prodding... pleading...but all you hear are crickets. So, what now?

Most of your clients are stuck because they are in overwhelm mode and need to know what the next step is!

They do not have a vision or if they do, they see it as a daunting project, like eating an elephant. You do know how to eat an elephant, right? One bite at a time. Heads-in-sand, they are executors and administrators reluctant to take any action because fear has them frozen.

Here's a suggestion for softball action step #1: Try the friendly neighbor approach: Offer them gentle reminders, maybe a friendly gift like a book and a note that inspires them. Something that

makes them happy and reminds them you're still on good terms.

Offer an office consultation (a free Uber ride?) to get them in front of your desk. Give them a vision that they see themselves in. Then, show them a way to get there and a way out of the mess they're in. Try to eliminate the barriers. Just make sure it's obvious they need to take action while in front of you to assure the task is completed.

Letters might get their attention. If anything, it gives you an excuse to create dialogue.

However, there are some clients who need a bigger nudge...

## A nudge from the judge!

Perhaps an **Order to Show Cause** or third-party threats to remove them or terminate their powers will work. If obstinacy persists, suggesting the names of a few professional fiduciaries will be enough to get their attention.

*"If it weren't for deadlines, almost nothing would ever get done"*

Now if you're getting this, don't forget to have a plan to get your fees paid! Just because your client is difficult doesn't mean you intend to be a non-profit doing pro-bono work.

## What to do next...

Feel free to call me directly and we can discuss how to get your client moving. I'll help you show your client a path out of overwhelm and into a fresh, clean start. It doesn't need to be complicated going forward.

You can call me at **1-800-779-2552**. If you ask your client to call directly, have them visit the website first at **Closeprobate.com** prior to calling.



Rick Harmon

**"Property can be distributed and kept in the family just for now... or forever. CloseProbate<sup>SM</sup> Fiduciary Mortgages are equity-based and non-recourse"**

Call me directly to discuss these (and other) property issues:

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## Here's your **CloseProbate™** Network Letter

### **RICK'S RANTS:**

Happy New Year!

You may have noticed the little "HERO" icon that's used in our marketing. We've been using this to remind you that we believe YOU are the hero!

Who would have imagined a pandemic would change our lives so much in such a short time!

Can you that believe you've been reading my "rants" for well-over thirty years? I hope that's because you see value beyond light entertainment. It probably has something to do with you connecting with the mindset of a gray-haired, kindred spirit who knows what you must go through just to help your trust and estate clients get through the tough times.

As both of us knows, a good predictor of new probate filings is the economy. California's real estate continues to hold white hot values and high rents are encouraging

families keep properties like never before. It seems that the February 16th Prop 19 magic bewitching date will cause a great many owners of inherited real estate to lose the benefits of Prop 13 and Prop 58 Parent to Child tax exemption. Keep inherited property in the family! Now more than ever is the time that your clients are weighing the effect of selling, only to pay crazy high rent. I'll continue helping your clients **keep inherited their property in the family**, just for now...or forever!

My plan for 2021 and beyond is to provide you with new tools to help you communicate with your clients better, educate your staff and make administration easier for you and your team.

I never lose sight that, to the client, **you are always the Hero.**

A handwritten signature in blue ink that reads "Rick".

**We make loans to the people in charge of cash-poor estates and trusts in California.**

**Contact us when your client requires liquidity without selling or you wish to "strategize" financial and other solutions.**

**(800) 779-2552**



**Be the Hero™**

**Here are (4) ways I can help you CloseProbate™**

- 1. Borrow on your probate or trust real estate**
- 2. Get Inspired: Rick's Rants (Rick@RickHarmon.com)**
- 3. CALL RICK - Get guidance and resources**
- 4. RickHarmon.com for more ideas about inherited property, tangled trusts and estates in chaos**