JP MARKETING

EBOOK + AUTOMATION KIT

The $3,000 Estate Planning Seminar Marketing Playbook

Fill library seminars with Facebook ads and turn attendees into clients with GoHighLevel

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Why this works

Lots of people know they "should" have a will or trust. They just never get around to it. A **free educational seminar** gives them a reason, a date, and a trusted place to learn: the **local library**.

Then a good follow-up system turns attendees into consultations, and consultations into clients.

Real results from our campaigns

These are turnout numbers from campaigns we ran with about **$3,000 in Facebook ad spend** each:

Market	Ad spend	People who showed up	Cost per attendee
New Jersey	~$3,000	60	~$50
Katy, TX	~$3,000	40	~$75
New York	~$3,000	20	~$150

What we learned:

- Results vary a lot by market. The **East Coast** (especially New Jersey) has worked best for us.
- **Suburbs with lots of homeowners 55+** tend to do better than dense city areas.
- **Watch out for markets like Arizona**, where people are used to free steak-dinner seminars. Many attendees come for the meal, not the topic, and your library event won't compete on food.
- Your numbers will be different. Use these as a starting point, not a promise.

Part 1: Pick your market and venue

The market

- [ ] Lots of homeowners age 55+ within 15 to 20 minutes of the library
- [ ] Not flooded with free-dinner seminars
- [ ] The firm is licensed in that state
- [ ] An attorney who's comfortable speaking for 45 to 60 minutes

The library

1. Call the library's room booking desk 4 to 6 weeks ahead.
2. **Ask about their rules.** Many libraries require events to be free, open to the public, and educational. Some don't allow selling or signing up clients in the room. Follow their rules: teach in the room, book consults by phone or online.
3. Room for 40 to 80 people, with chairs, a screen, and a microphone if possible.
4. Easy parking and wheelchair access.
5. Book **2 sessions** to give people a choice. Example: Tuesday 10:30am and Thursday 6:30pm (or two sessions on the same day).

> **Tip:** Some libraries ask that you don't use their logo or say they 'sponsor' you. Say 'held at the [Name] Library,' not 'presented by.'

Part 2: The seminar title and topic

Pick a simple title that answers a fear or a question:

- Wills vs. Trusts: What Every [State] Family Should Know
- How to Avoid Probate in [State]
- Protect Your Home and Savings: Estate Planning Basics
- What Happens to Your Home If You Go Into a Nursing Home?
- Estate Planning 101 for Parents and Grandparents

What to cover (45 to 60 minutes):

1. What happens if you die without a will in [State]
2. Wills vs. living trusts (simple pictures help)
3. How probate works and how to avoid it
4. Power of attorney and health care directives
5. Common mistakes (old beneficiaries, joint accounts, no plan for kids)
6. Long-term care and protecting your home (general info)
7. Q&A
8. How to get a free consultation

Give everyone a **printed workbook** with a checklist. It makes the event feel valuable and gives them something to bring to the consult.

Part 3: The $3,000 Facebook plan

Setting	Pick this
Objective	Leads
Where people sign up	Instant form (more sign-ups) OR a GHL landing page (fewer but more committed sign-ups). Start with the instant form; test the landing page later.
Budget	$3,000 total. About $110 to $140 a day for 3 to 4 weeks before the event
Start date	21 to 28 days before the first session
Location	10 to 20 mile radius around the library (drop areas with heavy traffic or water in between)
Age	55+ (some markets 50+)
Audience	Advantage+ audience. Suggestions: retirement, grandparents, homeowners, AARP-type interests (whatever is available)
Placements	Advantage+ (Facebook will do most of the work; this age group is heavy on Facebook)

> **Tip:** If Meta ever puts your ad into a Special Ad Category (like financial products), it will limit age and location targeting. Keep the ad about legal education, not about investments, loans, or insurance products.

Budget pacing:

Week	Spend	Goal
Week 1 (days 28 to 21 out)	~$700	Test 4 to 6 ads, find winners
Week 2 (days 21 to 14 out)	~$900	Push winners
Week 3 (days 14 to 7 out)	~$900	Fill the seats
Last week (days 7 to 1 out)	~$500	Last-chance ads, 'seats are filling'

Aim for about 2x more sign-ups than seats. Many people who register won't show. The reminder system (below) closes that gap.

Part 4: Facebook ad examples

Ad 1: Simple invite (image)

Image: Photo of the actual library + text overlay: "FREE Estate Planning Workshop at the [Library Name]. [Dates]."

Primary text: Do you have a will? What about a trust? Join local estate planning attorney [Name] for a free, no-pressure workshop at the [Library Name]. Learn how to protect your family, your home, and avoid probate in [State]. Two times to choose from: [Date/Time 1] or [Date/Time 2]. Seats are limited. Attorney Advertising.

Headline: Free Estate Planning Workshop

Button: Sign Up

Ad 2: Will vs. trust (video, 30 to 45 sec)

Script: "Hi, I'm [Name], an estate planning attorney here in [Town]. The question I get most is: do I need a will or a trust? The answer depends on your family, your home, and what you want to avoid, like probate. I'm teaching a free workshop at the [Library] on [dates] where I'll explain it all in plain English. No cost, no pressure. Tap the button to save your seat."

Headline: Will or Trust? Learn Free

Ad 3: Probate question (image)

Image: Clean graphic: "What is probate, and how can your family avoid it?"

Primary text: Probate can take time and cost money. Many families don't realize there are simple ways to plan ahead. Learn how at our free workshop at the [Library], [dates]. Attorney Advertising.

Headline: How to Avoid Probate in [State]

Ad 4: Protect your home (image)

Primary text: Worried about what happens to your home and savings if you need long-term care someday? Come to a free educational workshop at the [Library]. Ask your questions. Leave with a checklist. Attorney Advertising.

Headline: Protect Your Home & Savings

Ad 5: Social proof (image)

Image: Photo from a past workshop (room full of people, with permission).

Primary text: Over [number] local families joined our last workshop. Here's what one said: "[short real quote, with permission]." Next workshop: [dates] at the [Library]. Seats are limited. Attorney Advertising.

Headline: Join Your Neighbors This Month

Ad 6: Last chance (image, final week)

Primary text: Only a few seats left for this [day]'s free estate planning workshop at the [Library]. Save your seat now. Attorney Advertising.

Headline: Last Few Seats Left

Images that work: the real library, the attorney smiling, a full room, a simple checklist graphic. Avoid: stock photos of old people looking sad, money, gavels.

Part 5: The sign-up form

Questions:

1. Which session? ([Date/Time 1] / [Date/Time 2])
2. How many people are coming? (1 / 2 / 3+)
3. Do you have a will or trust now? (Yes, a will / Yes, a trust / No / Not sure)
4. Name, phone, email (pre-filled)

Consent text:

> By signing up, you agree that [Firm] may contact you about this event and related services by phone, text (including automated reminders), and email. Consent is not required to attend. Msg and data rates may apply. Reply STOP to opt out. Attorney Advertising.

Part 6: GHL setup

Pipeline: Estate Seminar

Stages: Registered > Confirmed > Attended > Consult Booked > Consult Held > Client Signed > No-Show > Not Now

Tags

`seminar-[city]-[date]`, `session-1` / `session-2`, `confirmed`, `attended`, `no-show`, `has-will`, `has-trust`, `no-plan`

Workflow 1: Registration and reminders

Trigger: Facebook form submitted (or GHL form submitted)

When	Channel	Message
Instantly	Text	You're in! Your seat is saved for the free Estate Planning Workshop at [Library] on [date] at [time]. Address: [address]. Bring a spouse or family member if you like. - [Firm]. Reply STOP to opt out.
Instantly	Email	Confirmation with date, time, map link, parking tips, what you'll learn, and a calendar invite (.ics). Add 'Attorney Advertising' footer.
7 days before	Email	'What you'll learn' + a quick question: 'What's your #1 question about wills or trusts?' (people who reply are more likely to show)
3 days before	Text	Hi [First Name]! Just 3 days until the free estate planning workshop at [Library], [day] at [time]. Reply YES to confirm your seat.
1 day before	Text	See you tomorrow at [time] at [Library]! Parking is [tip]. Reply YES if you're still coming, or NO so we can give your seat to someone else.
Morning of	Text	Today's the day! Workshop starts at [time] at [Library], [room name]. We'll have your workbook ready.
2 hours before (evening session) or 1 hour (morning)	Text	Starting soon! [Room name] at [Library]. [Map link]

Branches:

- Replies YES → tag confirmed, move to Confirmed
- Replies NO → tag not-now, send 'No problem! Want us to save you a seat at the next one?' and offer the other session
- No reply by 1 day before → task for staff to call them

Event day

1. Bring a tablet or phone with a GHL sign-in form or a QR code on a sign at the door.
2. Each person checks in → tag attended (and their guests too).
3. Hand out workbooks with a **consult booking QR code** on the back.
4. At the end, tell people how to book a free consultation (follow the library's rules about sign-ups in the room).
5. Have 1 to 2 staff available just outside the room (or right after) to help book consults on the calendar.

Workflow 2: After the event (attended)

Trigger: tag attended added

When	Channel	Message
Same day (2 hours after)	Text	Thank you for coming today, [First Name]! As promised, here's the link to book your free consultation with [Attorney]: [link]. Spots this week go fast.
Same day	Email	Thank-you + slides/summary + your checklist + booking link
Day 1	Call	Staff calls: 'Did you have any questions from the workshop? Want to grab a consultation time?'
Day 3	Text	Hi [First Name], quick reminder: workshop guests can book a free 30-minute planning consult. Here are this week's times: [link]
Day 5	Email	Story email: a (permission-based or anonymous) example of a family that avoided probate problems by planning.
Day 7	Text	Still thinking about your plan? Most families take 2 meetings to get it done. Book your first one here: [link]
Day 10	Call	Final personal call
Day 14	Email	Workshop-guest consult offer ends [date] (only if your bar rules allow time-limited offers).
Day 30+	Email monthly	Helpful estate planning newsletter. Invite to the next workshop.

Stop all of this the moment they book a consult.

Workflow 3: No-shows

Trigger: event ended and no attended tag

When	Channel	Message
Same day	Text	We missed you today, [First Name]! No worries. Want the workshop checklist and a seat at our next one? Reply YES.
Day 1	Email	Here's the free checklist + the next workshop date (or a short recorded video version).

When	Channel	Message
Day 3	Text	Would a quick 15-minute call with our team be easier than a workshop? Pick a time: [link]
Day 7	Email	Invite to the next workshop
Monthly	Email	Newsletter + future events

Workflow 4: Consult booked

When	Message
Instantly	Confirmation + what to bring (list of assets, current will/trust if any, list of family members, questions)
2 days before	Email: short 'what to expect' + a simple intake questionnaire (GHL form)
1 day before	Text reminder: Reply C to confirm
2 hours before	Text with address or video link
No-show	Text right away + call + rebook sequence (Day 1, 3, 7)

Part 7: The numbers sheet

We already know the first numbers from our campaigns. Fill in the rest for yours.

Number	NJ example	Katy example	NY example	Yours
Ad spend	$3,000	$3,000	$3,000	
Registrations				
Attended	60	40	20	
Cost per attendee	$50	$75	$150	
Show rate (attended / registered)				
Consults booked				
Clients signed				

Number	NJ example	Katy example	NY example	Yours
Average fee				
Revenue				
Return (revenue / ad spend)				

Formulas:

- Cost per attendee = ad spend ÷ attendees
- Show rate = attendees ÷ registrations
- Cost per client = ad spend ÷ clients signed
- Return = total fees ÷ ad spend

Part 8: Tips that make the biggest difference

1. **Reminders are everything.** The 3-day, 1-day, and morning-of texts can make a big difference in how many people show up.
2. **Ask for a YES.** People who confirm are much more likely to come.
3. **Make it feel like a class, not a sales pitch.** Teach real stuff. Trust is the whole game.
4. **Book consults within 7 days.** Interest fades fast.
5. **Bring help.** One attorney can't talk to 60 people after the event. Have staff with tablets.
6. **Run 2 sessions.** More people can make it.
7. **Avoid free-dinner markets** (like parts of Arizona). Your crowd there may be there for the food.

Part 9: Rules to follow

- Follow your state bar's rules for seminars, ads, and follow-up
- 'Attorney Advertising' labels where required
- Don't give individual legal advice to the group; keep it general
- Follow the library's rules for events
- Get consent before texting and honor STOP right away
- Don't use photos of attendees without permission

Launch checklist

- [ ] Library booked (2 sessions)
- [ ] Library rules checked
- [ ] Seminar title and slides ready
- [ ] Workbooks printed with booking QR code
- [ ] 6 ads made and approved by the firm
- [ ] Form + consent text approved
- [ ] Facebook form connected to GHL
- [ ] Reminder workflow tested
- [ ] Check-in form/QR ready
- [ ] After-event and no-show workflows tested
- [ ] Consult calendar open for the week after the event
- [ ] Staff assigned for event day and follow-up calls

Want us to do this for you?

JP Marketing helps local businesses show up on Google, Google Maps, and AI search tools like ChatGPT. We build the websites, write the pages, run the ads, and set up the follow-up.

Book a free strategy call at jpmarketing.co. We'll look at your site and your Google profile, and show you the 3 fastest wins for your business.

Rules on Google, Meta, and AI tools change a lot. This guide was last updated November 2026. It is general marketing info, not legal advice.