

# Frequently Asked Questions

**Question: “Don’t I have to be an Attorney to refer my clients to Heritage Living Trust?”**

**Answer:** No. Heritage Living Trust has an Attorney on staff. You are simply asking the client a simple question, “Do you have a Living Trust?”

**Question: “Do I need a special license?”**

**Answer:** No special license is needed. You are simply recommending Heritage Living Trust to the client. Heritage Living Trust prepares the trust.

**Question: “How hard is it to learn to do this?”**

**Answer:** It’s not hard at all, in fact many of our Agents say it’s the easiest thing they’ve ever done. 4 Training DVD’S, 1 Presentation DVD, Agent Manual, a Sample Trust and more are provided in your Agent’s Kit to make learning quick and easy.

**Question: “What kind of support do you provide?”**

**Answer:** We provide our Agents with on-going toll-free and email support, plus access to additional training, marketing and sales support materials on our Agent Resource Page. We provide our clients with free lifetime changes and support.

**Question: “How do I describe the Trust to my clients?”**

**Answer:** You can refer your clients to our website, give them your personalized 4-color flyer, use our PowerPoint Presentation or have your client watch the presentation DVD. We also have an Agent training presentation on DVD.

**Question: “How much time does it take to make a Living Trust Presentation?”**

**Answer:** The presentation takes approximately one hour; from the time you enter the client’s home to the time you leave with a check and a completed one-page application.

**Question: “How long has Heritage Living Trust been in business?”**

**Answer:** Heritage has been preparing Living Trusts nationally for 18 years.

**Question: “Do I get a commission when I buy a Heritage Living Trust for myself?”**

**Answer:** Yes. Plus you get credit towards reimbursement of your Agent Kit and credit towards your free mailer.

**Question: “How much do I get paid?”**

**Answer:** Email: [support@heritageagent.com](mailto:support@heritageagent.com) or call 800-937-9831 for contracting and commission information.