

PRIVATE EXECUTIVE COACHING

Included with your LegacyKey Membership

POWERED BY LEGACYKEY



CLARITY

Step back from the day-to-day and see your practice with a clear, strategic eye.



CONFIDENCE

Make big decisions with a seasoned advisor in your corner, not on your own.



MOMENTUM

Turn good intentions into action with accountability that keeps you moving.

As an ENTERPRISE+ member of LegacyKey, you have access to a **Private Executive Coach**; a dedicated thinking partner who meets with you monthly to help you grow your firm, sharpen your strategy, and lead with confidence. Running a thriving estate planning practice means wearing every hat at once: rainmaker, manager, strategist, and counselor. Your coach gives you a standing, judgment-free space to work *on* the business rather than just *in* it, bringing an outside perspective, a steady sounding board, and the accountability that turns plans into progress.



PRACTICE GROWTH STRATEGY

Work through revenue goals, pricing, service offerings, and your firm's path to sustainable growth with a coach who understands the business side of estate planning.



LEADERSHIP & MINDSET

Develop the habits, focus, and resilience of a law firm owner, from managing your energy to leading change; with a coach invested in how you show up.



TEAM & HIRING GUIDANCE

Talk through building your team, delegating with confidence, defining roles, and leading staff so your firm runs well whether or not you're in the room.



GOAL SETTING & ACCOUNTABILITY

Set clear targets each month and review your progress against them — so the priorities that matter most actually get done, not just discussed.



WORKFLOW & OPERATIONS

Refine how clients move through your practice from welcome to signing, so the Five Doors journey runs smoothly and your time goes where it matters most.



MARKETING & VISIBILITY INSIGHT

Bring your toughest growth questions (positioning, messaging, community presence, etc.) and leave with a clear, prioritized plan for getting in front of the right advisors and the right clients at the right moment.



ADVISOR NETWORK ACTIVATION

Strategize how to grow and energize your referral relationships — turning the advisors in your network into a steady, dependable pipeline.



CONFIDENTIAL SOUNDING BOARD

A private, off-the-record space to think out loud about the decisions that keep you up at night — with someone outside your firm who wants to see you succeed.

HOW IT WORKS

UP TO FIVE HOURS

Your coaching benefit includes up to five (5) hours per calendar month, scheduled by appointment around your practice; whether you prefer one focused session or several shorter check-ins.

BOOK BY APPOINTMENT

Reserve your time directly with your coach at the moments that suit you. Bring an agenda or come with an open question; every session is yours to shape.

FRESH HOURS MONTHLY

Time allotments reset at the start of each calendar month, so you always begin with a full balance. Unused hours don't carry over; your nudge to make this time a steady habit, not a someday plan.