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Earning the Trust of Others

Inter Vivos aims to provide every family with access to quality estate planning that they can afford specific to their needs. Founding Partner, Glen Wagstaff explains more about the firm and the services that it offers.

Inter Vivos, PLLC is an estate planning law firm which offers customised planning solutions for clients, including Estate Planning, Tax Planning, Asset Protection Planning, Business Planning, Legacy Planning and Estate Administration.

Outlining the overall mission of the firm, Founding Partner, Glen Wagstaff describes what steps the firm takes in order to reach its goals, and how staff integrate innovation into every aspect of its work. He notes that each project and individual is unique, and the team treat clients in this manner.

"Here at Inter Vivos, our goal is to become the largest estate planning law firm in the world and to offer quality planning solutions to every person regardless of status or background at a price they can afford. We look at each and every case as unique, and do not believe in one size fits all solutions. As such, we push each of our attorneys to develop a specialty within estate planning, and to innovate within that field to offer greater value to our clients. As well as, new or creative ways to get our message across to those clients who need that type of planning the most."

"While many law firms avoid technology, we embrace it and utilise platforms to offer multiple planning options to our clients..."

Differentiating itself from its competitors, Glen points us towards the adaptability and versatility of the firm as key factors in marking itself out as the best possible option for clients.

"The fact that we have so many specialties within planning differentiates us significantly. Everything from planning for benefits such as Medicaid and benefits for individuals with special needs to gun trusts, pet trusts, international planning, and offshore asset protection planning.

"In all, we have over 24 distinct planning specialties within estate planning which we market to and have attorneys develop practices around. Another big difference is that we can handle cases across states and across countries as needed, to make sure a client's interests are being taken care of properly."

Providing us with a brief overview of the industry at present, Glen observes that the firm must have a licensed attorney operating in every state or country that it operates in. In turn, this limits the speed at which the firm is able to expand, which is quite important within the ever evolving estate planning market. He also then goes on to explain what techniques staff employ to stay ahead of emerging developments which are arising on a constant basis.

"Estate planning is a jurisdiction specific industry, which means that we have to have licensed attorneys in every state or country that we practice in. This limits how quickly we can grow and how easy it is to establish ourselves in any particular market. Beyond that, non-lawyer services offering cut-rate planning confuse consumers into not trusting attorneys. At the end of the day, nothing replaces having a competent licensed professional helping you protect your interests, but competing on price with those kinds of services can be difficult.

"While many law firms avoid technology, we embrace it and utilise platforms to offer multiple planning options to our clients as well as remote consultations, training, and collaboration across the country and more cost-effective solutions for completing work."

Regarding the internal culture within the firm, Glen comments on the freedom in which staff are given in order to find the best solution and provide the best service. He alludes to how he ensures all staff are in the best possible position to answer queries which clients may have.

"Each attorney in the firm is given a lot of flexibility and independence for their personal practice, but each is given resources to help them with every aspect of their business, a managing attorney to assist them and provide quality control; and training on the best practices/ procedures to follow in handling cases."

In his concluding comments, Glen outlines what the future holds for the firm and what plans the team have lined up in order to further establish themselves as a leader in the industry. He signs off by referring to the passion amongst staff and how they are always looking to provide the best service possible.



“Looking ahead, this year we are doing a 12-city speaking tour and hope to complete it with a TED talk about legacy planning, and establishing a legacy of values that can be passed between generations. Beyond that, we plan to have a presence in all 50 states by 2020 and begin international expansion shortly after that.

“Ultimately, we are passionate in our belief that everyone has a need to plan their estate, whether to pass property to their heirs or avoid problems during incapacity or after death. Every person has an estate and every person has some need to plan against the worst case scenario.”