

Help with "I haven't heard back from you" Language

I have 5 clients who have stalled. They are all at a place where they must decide something and get back to me. All but one are estate plans where they need to decide who to name in what roles, one is a nonprofit client who has to find one more board member. Discussions with all have been numerous, it's now just a matter of making a decision.

I don't want to close their files but it has been 6 months and I want to send an email saying something along the lines of "when you are ready to resume, contact me" but in a nice way. Otherwise, I keep the file open, I feel the need to check in so they know this is still ongoing, etc., and it is taking up more time than I have.

Thoughts and language would be very appreciated.

---

I'd send something like the letter below.

Dear Client:

Are you mad at me?

If not, please contact me ASAP with your decision about this-and-that and related matters.

If I don't hear from you, I'll put your file in "suspended animation", I won't contact you, and I'll wait for you to contact me with your decision(s).

Best wishes. Happy Holidays.

Russ Carmichael, Pennsylvania

---

It's almost like a "light" closing or disengagement letter... Language from these might help:

Ohio Bar Sample

<<https://www.oblic.com/wp-content/uploads/2019/04/SAMPLE-FILE-CLOSING-LETTER2019.pdf>>

Michigan Bar Sample <https://www.michbar.org/file/pmrc/articles/0000079.doc>

Alex Salmu, Michigan

---

I'm curious, why does it matter whether your EP clients have signed their documents? (Of course as a planner, I know it is best to sign.) But if our job is to give good advice and theirs is to decide what to do, what difference does it make? If it lasts too long, I understand that can be an issue. My engagement letter provides if the docs aren't signed within six months that I reserve the right to charge an additional fee to review and update the docs.

Presuming you use some sort of practice management software, can you see an automatic trigger for 2 months after the docs are sent to produce a reminder, "let me know if you have any questions" letter? Would that relieve you of the pressure with outstanding matters?

Deborah Matthews, Virginia

---

Generally, I would suggest sending a brief email stating status and then working on clients that are responsive. If a previously nonresponsive client shows back up to finish, I would then work them in with other pending matters rather than placing it as a priority over other work.

If the underlying issue is that you have not been paid for the work already done, consider revamping how you charge. Get enough money up front that a failure to follow through by the client does not place you at a financial disadvantage.

My current record on a client who waited to finish their estate planning is over ten years. If every client or potential client that I had sent a package to came back and I completed their plan, I would be a rich man. There is a fall out rate for a variety of reasons.

Darrell G. Stewart, Texas

---

Deborah--it matters because I don't want to leave clients out there flapping in the wind until I finally forget about them and then have to deal with that a year later. I don't like not hearing back for 6 months and having no idea where they are in the process, whether they plan to continue. I think my question would be, "why would this \*not\* bother you."

I don't pressure clients to decide but these clients have been clients for a year before they stalled. To let things stall indefinitely seems irresponsible on my part. I don't necessarily want to close the file--I wish there was a "backburner" to put them on.

Julie Mills, Ohio

---

Darrell: Each client is paid up--after the next steps they pay the second installment but we haven't started the next steps. Their documents aren't executed but are largely drafted completely. As someone mentioned in a previous post, they have paid and it's my clients who are at the disadvantage because I've been paid but they don't have what they paid for yet. One role to fill, one board member to choose, one final draft to confirm...

Julie Mills

---

I have a couple clients which are over 3-5 years. I send them an email every once in a while with a reminder. I just keep their file open until I hear back from them. This procrastination is not a frequent occurrence so I haven't changed my practice, but if it happens often, I might have to start to charge up front. However, as an example of what some people will do, I once gave a gift certificate away as a door prize for a seminar I did. It was for a free simple estate plan. That was 2 years ago, the person who won it hasn't called. I also sold 4 gift certificates at a church fundraiser for a simple estate plan. The people who bought them for \$100 each have yet to contact me, over a year later.

Just some ways to say, they are our clients, with all their faults.

Ed Burcham, Kentucky

---

Deb--I just read my response to you and want to make sure you know that I wasn't implying that you are irresponsible. I just worked for attorneys in the past who let matters go for 3+ years with no client communication and that sent up red flags for me.

Julie Mills

---

Here is what I would do.

Dear Client,

I hope this letter finds you safe and well. I just want to update you on the status of your file with my office. As of today, we are awaiting you to do/make/name xyz in order to complete your (whatever). Please provide this information by Y date. After Y date, I will be moving your file to inactive status. If you at a later time wish to finish your document, all you will need to do is to call my office, provide the necessary information, and we will complete it. Please let my office know if you have any questions or concerns. You can provide the necessary information either over the phone or by email to (email address)

Then if they don't provide by the date, send them another letter saying you have moved them to inactive and what they need to do to reactivate it, also if there will be additional fees later on to complete the work etc.

Erin M. Schmidt, Ohio

---

I understand part of the pressure is you wanting to have your clients taken care of. I come from the opposite experience. I worked for a guy who "made" clients in the first meeting schedule their signing three weeks later. When they returned for that meeting, they saw their docs for the first time, paid him to watch them read it, and then signed. I think clients process differently and I want to give them the room to do that in the best way for them. I can't get to perfect and yes something could

happen. I also had a PC call to schedule a meeting for planning for he and his wife and entirely unexpected died before the appointment. Today his widow signed her estate planning documents. Like most all in life, it is a balance. I will work hard for my clients, but I can't take on their stress if they are delaying.

Deborah Matthews

---

I recognize that everyone is happier when it is finalized, but I don't think you can do more than send a gentle reminder. A variety of causes lead to delays. If you keep them informed, including of some type of increased costs as a potential incentive if past a certain date, then to my view you have done what you can.

Darrell G. Stewart

---