

Your Legacy EP – Client Getting Started Guide

Version v1.0

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Welcome Message from the CEO

Thank you for choosing Your Legacy EP by Mindset².

This guide walks you step-by-step through the intake process, explains what you need, and helps you complete your estate planning profile with confidence.

We designed this system to make estate planning simple, clear, and approachable.

— Greg McIntyre, CEO

1. What You'll Need Before Starting

You will need your legal name, current address, contact details, spouse information if married, information about children or heirs, a list of assets, and any existing estate documents.

2. Creating Your Account

Enter your email and create a password. If the passwords do not match, the system will alert you. Once they match, you may continue to your dashboard.

Log In

Simplify Estate Planning & Trust Creation

Professional platform for creating trusts and estate documents with guided client intake, expert review, and streamlined document generation.

[Start Your Estate Plan](#)

 <h4>Client Portal</h4> <p>Secure dashboard for clients to manage their estate planning process and track progress.</p>	 <h4>Guided Intake</h4> <p>Comprehensive questionnaire to gather all necessary information for estate planning.</p>	 <h4>Expert Review</h4> <p>Professional staff review and validation of client information and documents.</p>	 <h4>Progress Tracking</h4> <p>Real-time status updates and milestone tracking throughout the process.</p>
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Ready to Get Started?

[Log In](#)

[Create Account](#)

Log In

Registration Form

Please fill in your details to get started.

Your Information

First Name Last Name

Email Address

Choose a Password

Enter Password Confirm Password

[Register](#)

3. Navigating the Dashboard

From your dashboard you will see your progress, your assigned professional, and the button to start or continue your Legacy Profile.

Let's get started.

First step is to create your Legacy Profile. In this process we will collect the information necessary to create your estate plan.

[Create Your Legacy Profile](#)

Your Profiles

Client	Modified	Status	Progress	Attorney	Actions
Bill Smithy	December 4, 2025 at 3:03 pm	New	<div style="width: 0%;"><div style="width: 0%;"></div></div> 0%	Unassigned	Open

Upcoming Appointments

No Appointments set.

Your Documents

No Documents generated.

4. Entering Your Information

You will enter your personal information, ID details, benefit information, spouse and family data, assets, and preferences for Powers of Attorney and healthcare decisions.



Welcome, Bill! ▾

Bill Smithy - Legacy Profile

Help us understand your estate and the wishes you have for your family.

About You

Welcome! This is the first step in a multi-step, guided process (you can see the steps to the right). We'll start with your details so the next pages fit your situation. Continue with Next when finished.

What services are you interested in?

- General Durable Power of Attorney Trusts Living Will
 Healthcare Power of Attorney Last Will & Testament Property Deed Changes
 Other

Are you filling this form out for yourself or someone else?

- Yourself
 Someone Else

Client's Full Legal Name (as it appears on the Drivers License) (Required)

First: Middle: Last: Suffix:

This will be the individual's full legal name who the Estate Planning documents are for.

Client's Date of Birth (Required)

Navigate Your Profile

Use this map to jump to various steps of your Legacy Profile intake.

Jump to... ▾

GUIDELINES FOR

About You

This page gathers your basic details and which estate planning services you're interested in so we can tailor the rest of the questions to your situation.

What to do here

- Select all services you may want (you can adjust these later).
- Enter the client's full legal name exactly as it appears on government ID.
- Provide the client's date of birth, mailing address, county, phone, and email (twice to confirm).
- Tell us what type of valid, non-expired government ID the client (and spouse, if any) has.
- Choose the client's marital status and, if married, enter the

Fullerton California

ZIP Code

Client's County of Residence

Orange

Client Contact Phone (Required)

Client Contact Email Address (Required)

Email Address

Does client have a valid, non-expired, government ID?

Notarization of documents requires a valid, non-expired government ID.

- Non-expired State Issued Driver's License
 Non-expired State Issued Identification
 U.S. Military ID
 U.S. Passport
 None of the Above

Driver's License / ID Card Number

Is the client receiving any government benefits?

- Social Security
 Disability
 Medicare/Medicaid
 VA Veterans Benefits

December 2027

Mo	Tu	We	Th	Fr	Sa	Su
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

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- Tell us what type of valid, non-expired government ID the client (and spouse, if any) has.
- Choose the client's marital status and, if married, enter the spouse's name, date of birth, and ID status.

Key terms

- **General Durable Power of Attorney:** Lets someone you choose manage your financial and legal affairs.
- **Healthcare Power of Attorney:** Lets someone you choose

5. Distribution & Property Details

Enter property addresses, indicate who should receive each asset, and list any special or charitable gifts.

Children, Heirs and Representatives

This page creates your list of people used throughout the form. Include every person who may be mentioned—especially all children—even if they aren't beneficiaries of your estate. Add each person once.

Children of Current Marriage

Do you and your spouse have children together?

Yes
 No

Children of Current Marriage (Full Legal Name)

First	Middle	Last	Suffix	Birthdate	Relation	
Jo	G	Smithy		11/31/1990	Daughter	+ -
Robert	B	Smithy		06/04/1995		+ -

Click the (+) to add additional children. Please list all children, regardless of inclusion in estate.

Your Children from Previous Relationships

Do you have children from a previous relationship?

Yes
 No

Children of Previous Relationships (Full Legal Name)

First	Middle	Last	Suffix	Birthdate	Relation	
				12/04/2025	Select...	+ -

Click the (+) to add additional children. Please list all children, regardless of inclusion in estate.

Navigate Your Profile

Use this map to jump to various steps of your Legacy Profile intake.

Jump to... ▼

GUIDELINES FOR Children and Heirs

This page builds your master list of people for your estate plan: all children, any other heirs, and anyone who may help administer your estate.

What to do here

- For each section, answer **Yes/No** and use the **(+)** **Add** button to list each person once.
- List **all children** (current marriage, your prior relationships, and your spouse's prior relationships), even if you do not plan to leave them anything.
- For each person, enter their **full legal name, birthdate, and relationship** (for example: son, daughter, step-child, friend, sibling).
- In **Additional Heirs**, add anyone (other than children already listed) you may want to receive part of your estate.
- In **Other Representatives**, add people who may help administer your estate (for example: executor, trustee, guardian, or professional advisors).

Key terms

Asset Information

Next we will create a simple inventory of your assets. We'll use this to design your estate plan, focusing on protection today and transfer later.

Retirement Accounts

Here you will list your retirement accounts such as IRAs, 401k's, Tax Qualified Annuities, etc. Traditional pensions should not be included in this sections as they are technically income and not considered an asset.

Do you have retirement accounts?

Yes
 No

Investment Accounts / Liquid Assets

Add the accounts that hold your cash and investments. Specify account type and an approximate balance. Joint accounts belong here, too.

Do you have investment accounts?

Yes
 No

Insurance Policies & Annuities

Add insurance policies and annuities you hold, including policies through work. Note the type, company and the coverage amount or current value. Estimates are fine.

Do you have life insurance policies or annuities?

Navigate Your Profile

Use this map to jump to various steps of your Legacy Profile intake.

Jump to... ▼

GUIDELINES FOR Asset Information

This page creates a simple snapshot of your financial assets so we can design an estate plan that protects them now and transfers them efficiently later.

What to do here

- For each asset type, answer **Yes/No** and, if **Yes**, use **Add** to list each account or policy.
- Under **Retirement Accounts**, list IRAs, 401(k)s, and tax-qualified annuities; skip traditional pensions.
- Under **Investment Accounts / Liquid Assets**, list accounts that hold your cash or investments (including joint accounts).
- Under **Insurance Policies & Annuities**, list life insurance and annuity contracts and their coverage amount or current value.
- Use **approximate values**—they don't need to be exact.

Key terms

- **Retirement accounts:** Tax-advantaged accounts like 401(k)s and IRAs used for long-term savings.
- **Investment / liquid assets:** Accounts holding cash or

Add Insurance Policies or Annuity

Insurance Type

Life Insurance

Annuity

Other

Other

Company

Benefit or Value \$

Cancel Add Insurance Policies or Annuity

Add Property

Address (Required)

48 Foxhill

Street Address

Address Line 2

Irvine California

City State / Province / Region

92604-3038 United States

ZIP / Postal Code Country

Property Classification (Required)

Primary Residence

Vacation Property

Rental Property

Commercial Property

Vacant Land

Farm Land

Is this property in the Present-Use Value (PUV) program? (Required)

Yes No

Estimated Value

Mortgage Balance (if any)

Distribution Instructions for this Property

Cancel Add Property

6. Uploading Documents

Upload prior estate documents or provide questions you would like addressed during your consult.

Final Review & Submission

All set! Your intake is complete. Everything is saved. If anything changes, head to your dashboard to review or update your details.

Existing Estate Documents Upload

If you have existing estate planning documents, uploading them for review can assist our attorneys in updating your estate plan. (PDF, DOC, DOCX or TXT)

Drop files here or [select files](#)

Accepted file types: pdf, doc, docx, txt, Max. file size: 128 MB.

Do you have any questions or additional information to provide?

How did you hear about McIntyre Elder Law?

If referred by an individual, please provide their first and last name.

[Previous](#)[Submit](#)

Navigate Your Profile

Use this map to jump to various steps of your Legacy Profile intake.

Jump to...▼

GUIDELINES FOR Submitting Your Profile

Almost complete! Please upload any existing estate documents, and let us know if you have any questions or special instructions. We'd also love to know how you heard about us.

7. Submitting Your Profile

Once submitted, your intake is reviewed and you will be contacted to confirm your appointment.

Welcome, Bill! ▾

Thank you!

Your Legacy Profile changes have been saved successfully.
We will reach out to you shortly to schedule a consultation.

[Return to Dashboard](#)

Welcome, Bill! ▾

Your Estate Planning Dashboard

Let's get started.

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[Create Your Legacy Profile](#)

Your Profiles

Client	Modified	Status	Progress	Attorney	Actions
Bill Smithy jduffy+Smith01@gmail.com	December 4, 2025 at 3:18 pm	Ready For Consult	<div style="width: 100%;"><div style="width: 100%;"></div></div> 100%	Unassigned	Open

Upcoming Appointments

No Appointments set.

Your Documents

8. Frequently Asked Questions (FAQ)

How long does intake take?

Typically 20–40 minutes, depending on information available.

Can I pause and return later?

Yes. Log out at any time and return using your email and password.

What if I don't know all answers?

Do your best; questions can be clarified during your consult.

Can someone help me complete this?

Yes, a trusted family member may assist you.

Is my information secure?

Yes. Your Legacy EP uses secure methods of storing and transmitting information.

What happens after submission?

Your consult will be scheduled and your information reviewed.

Can I make changes later?

Yes. Speak with your advisor and updates will be applied during document preparation.