Your Legacy EP – Client Getting Started Guide
Version v1.0

Welcome Message from the CEO

Thank you for choosing Your Legacy EP by Mindset^2.

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.

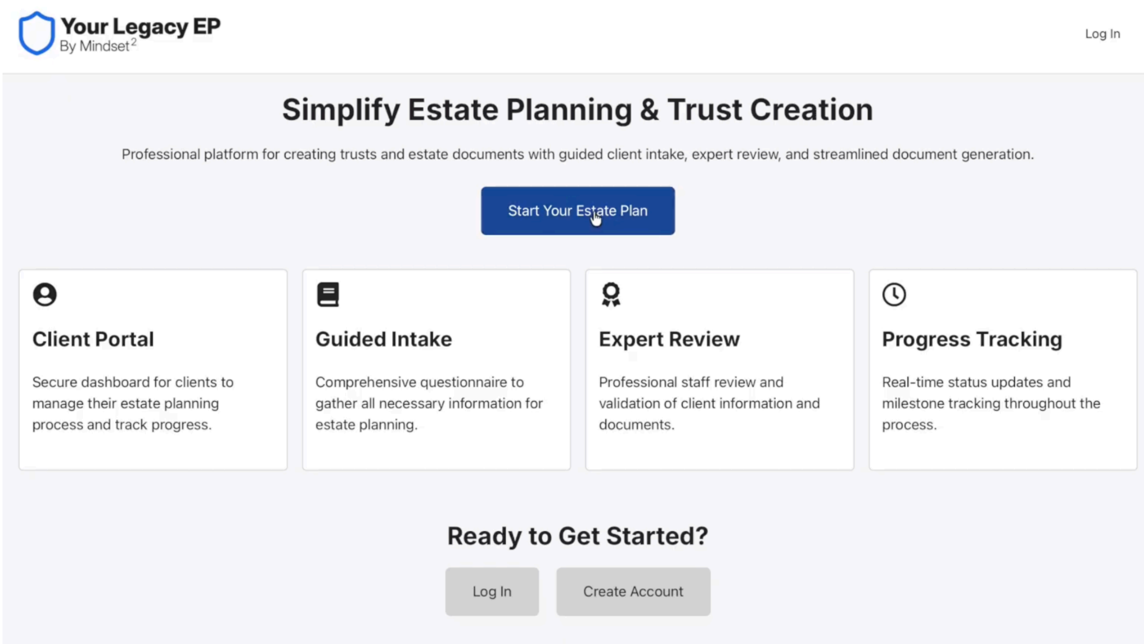
— Greg McIntyre, CEO

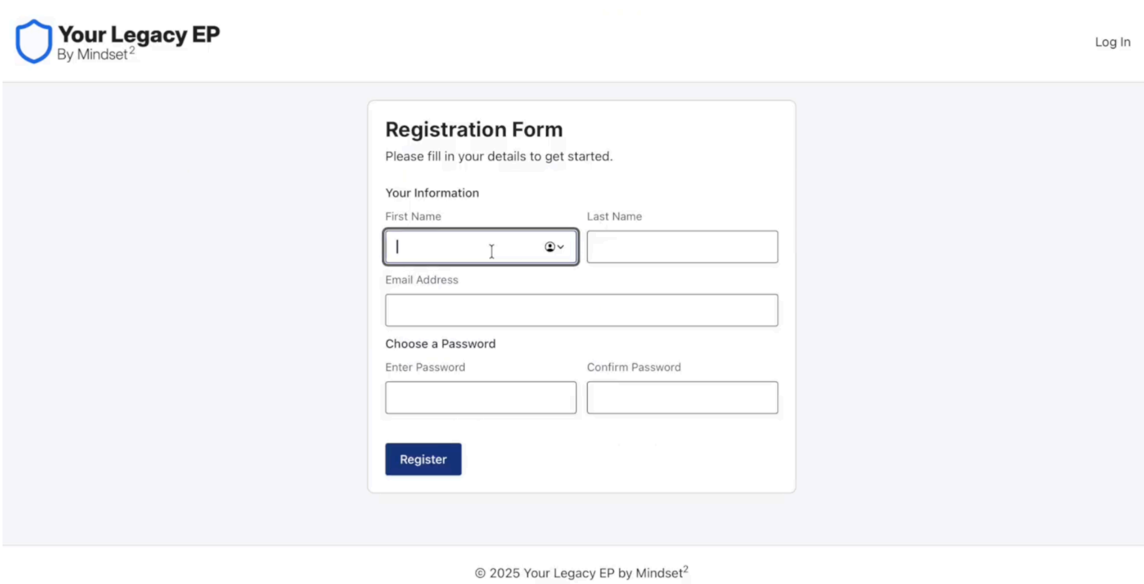
1. What You’ll Need Before Starting

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

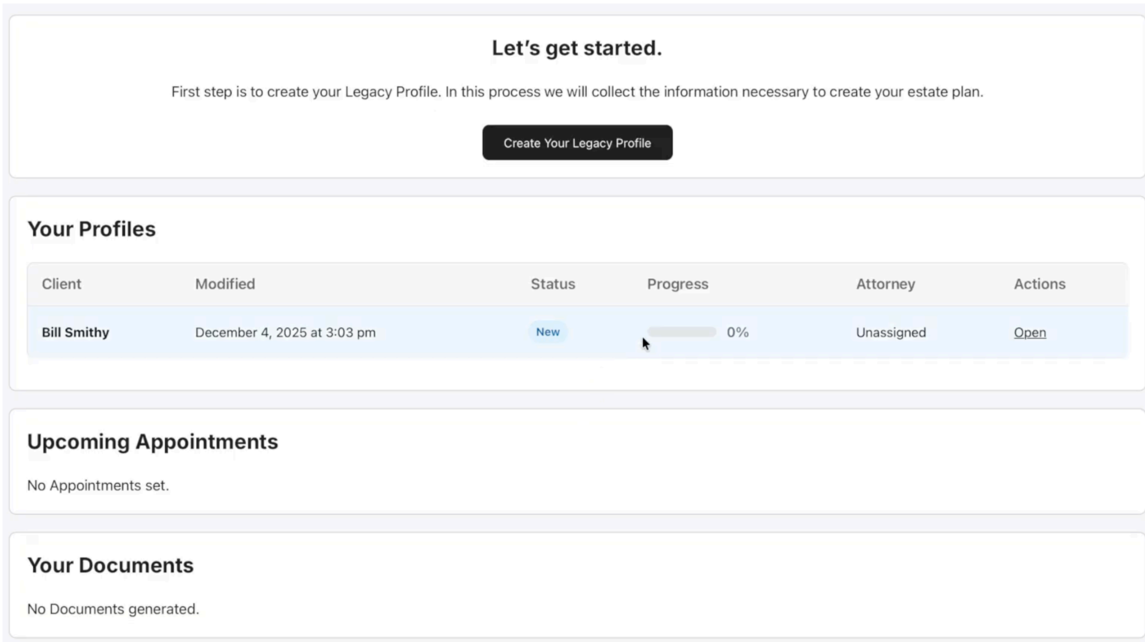
Enter your email and create a password. If the passwords do not match, the system will alert you. Once they match, you may continue to your dashboard.





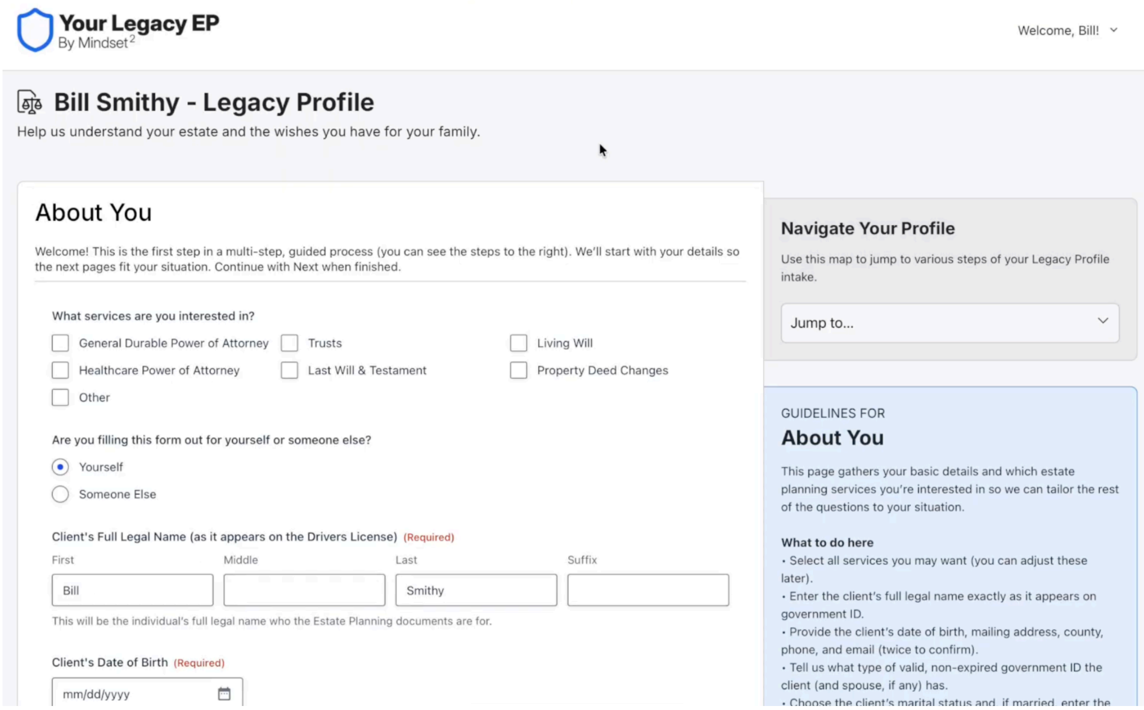
3. Navigating the Dashboard

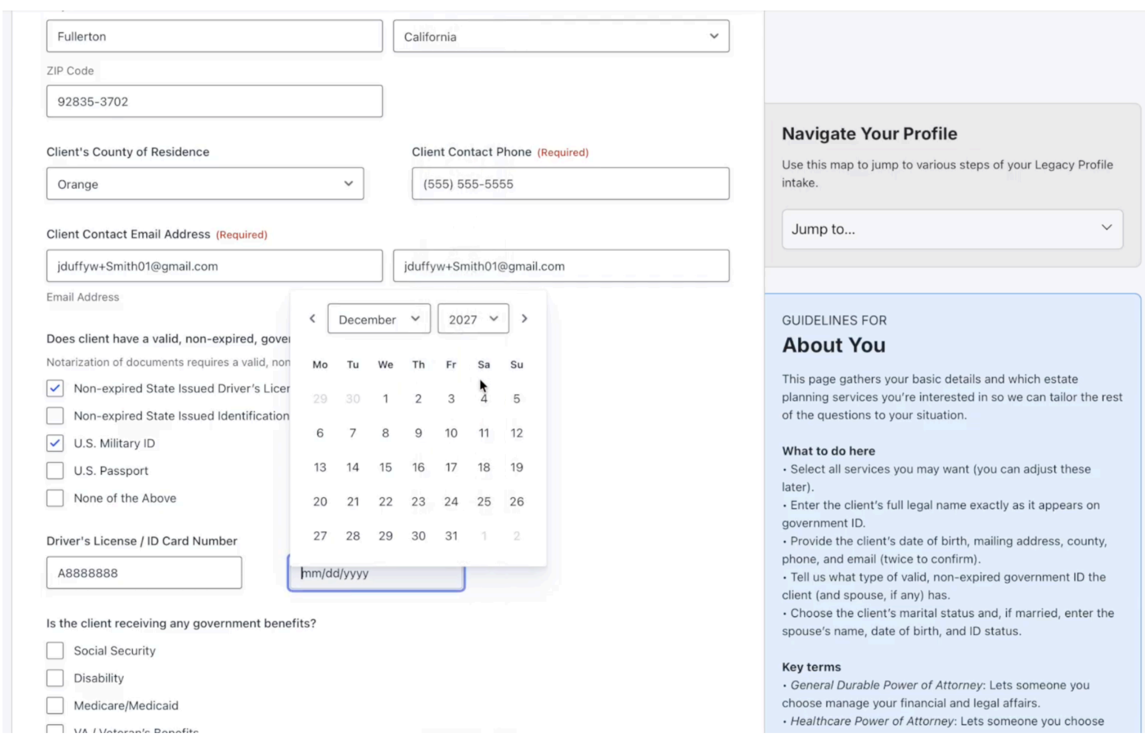
From your dashboard you will see your progress, your assigned professional, and the button to start or continue your Legacy Profile.



4. Entering Your Information

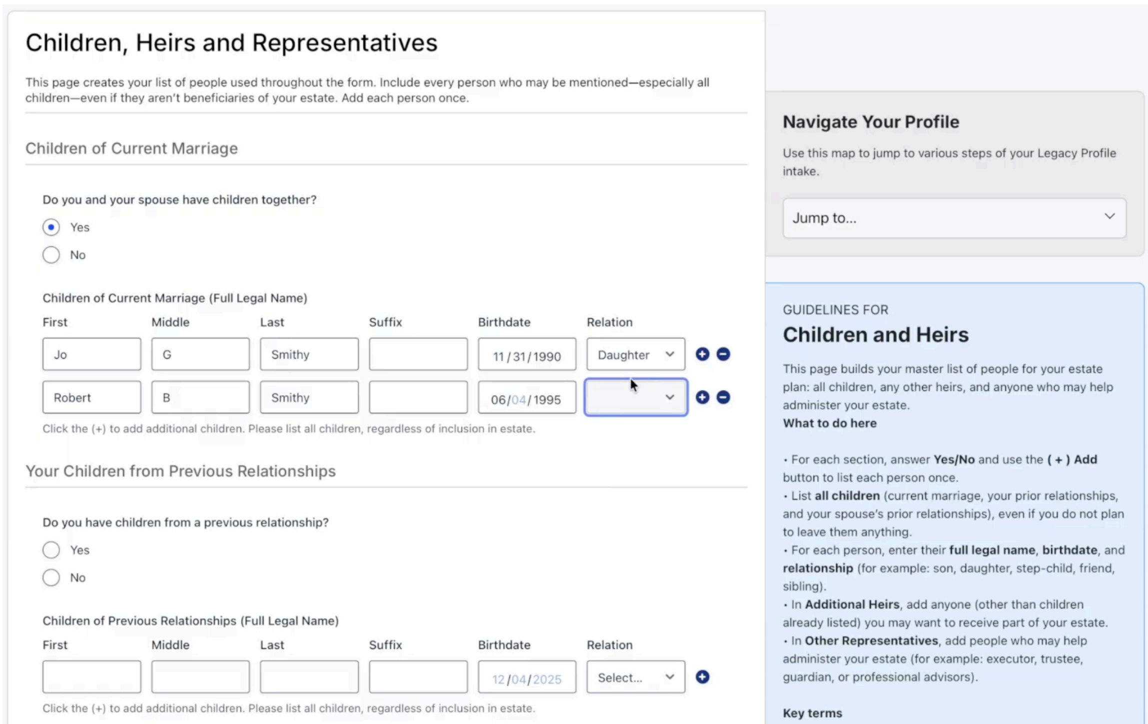
You will enter your personal information, ID details, benefit information, spouse and family data, assets, and preferences for Powers of Attorney and healthcare decisions.





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

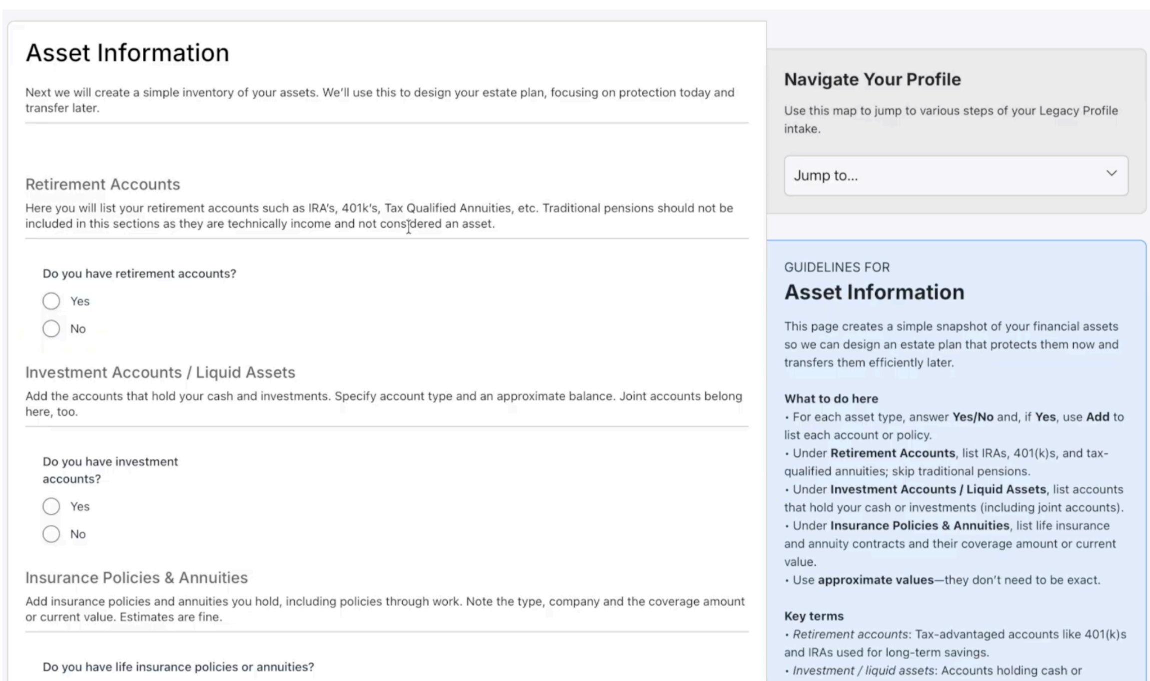
Children and Heirs

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 IRA's, 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

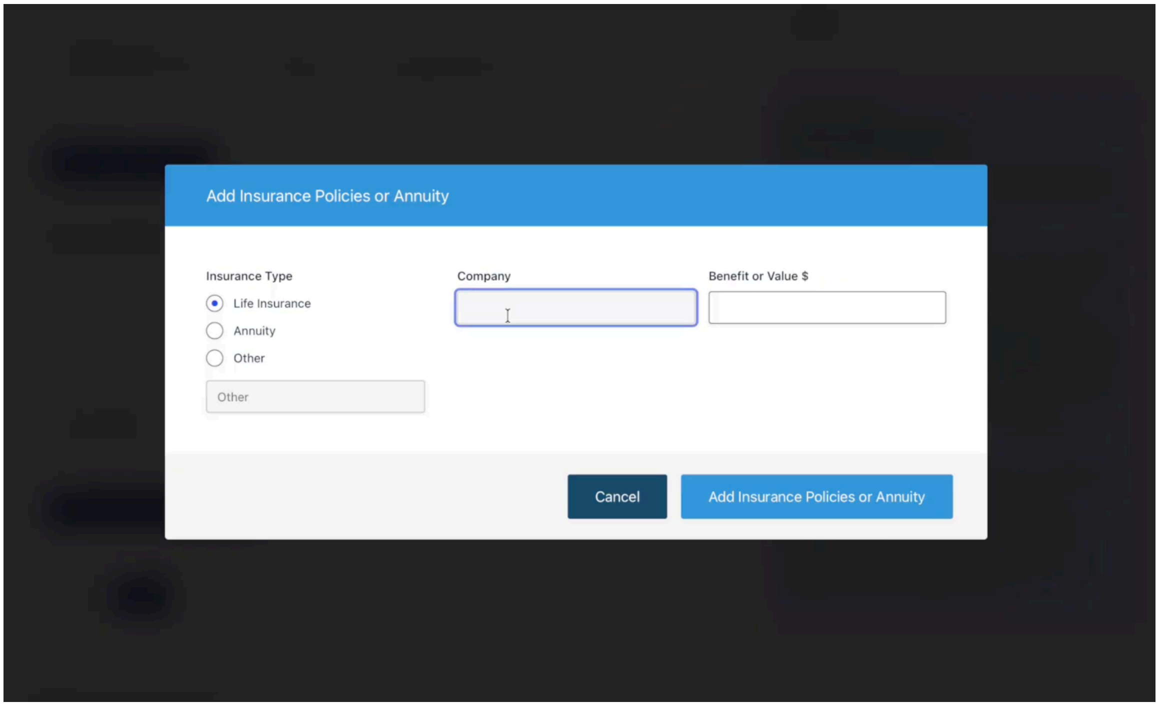
This page creates a simple snapshot of your financial assets so we can design an estate plan that protects them now and transfers them efficiently later.

What to do here

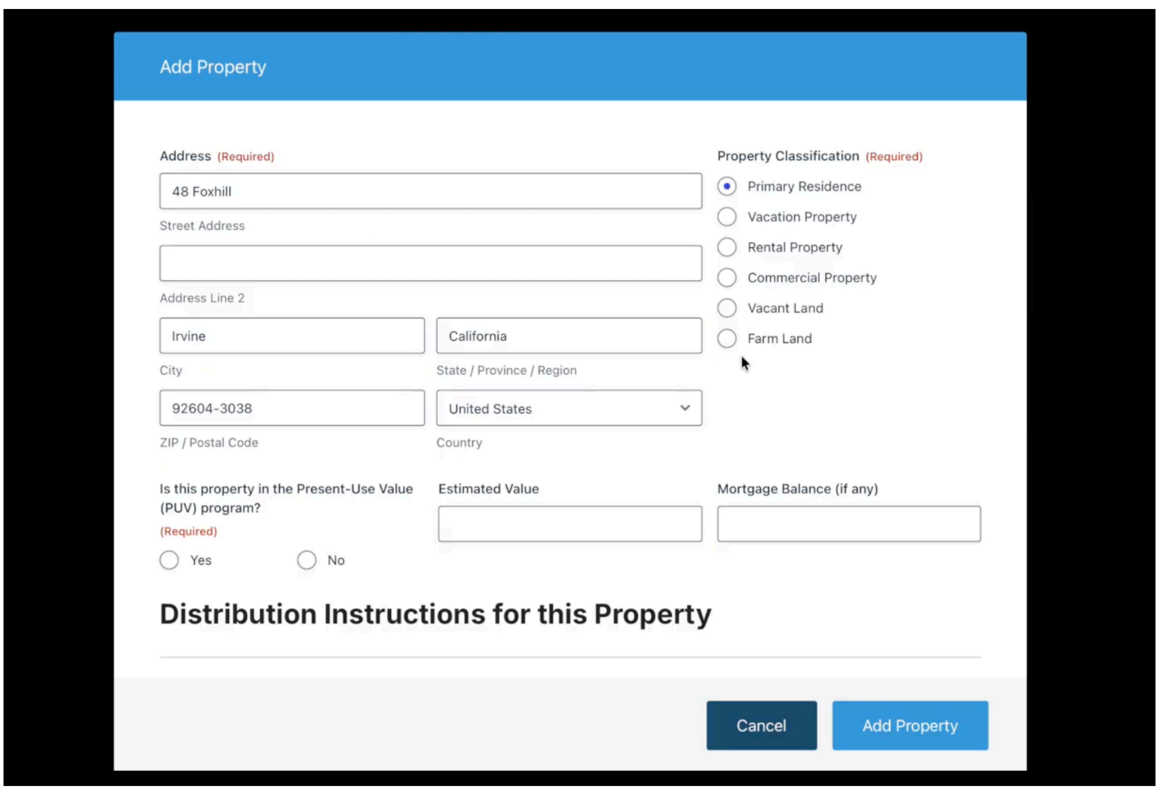
- For each asset type, answer **Yes/No** and, if **Yes**, use **Add** to list each account or policy.
- Under **Retirement Accounts**, list IRAs, 401(k)s, and tax-qualified annuities; skip traditional pensions.
- Under **Investment Accounts / Liquid Assets**, list accounts that hold your cash or investments (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



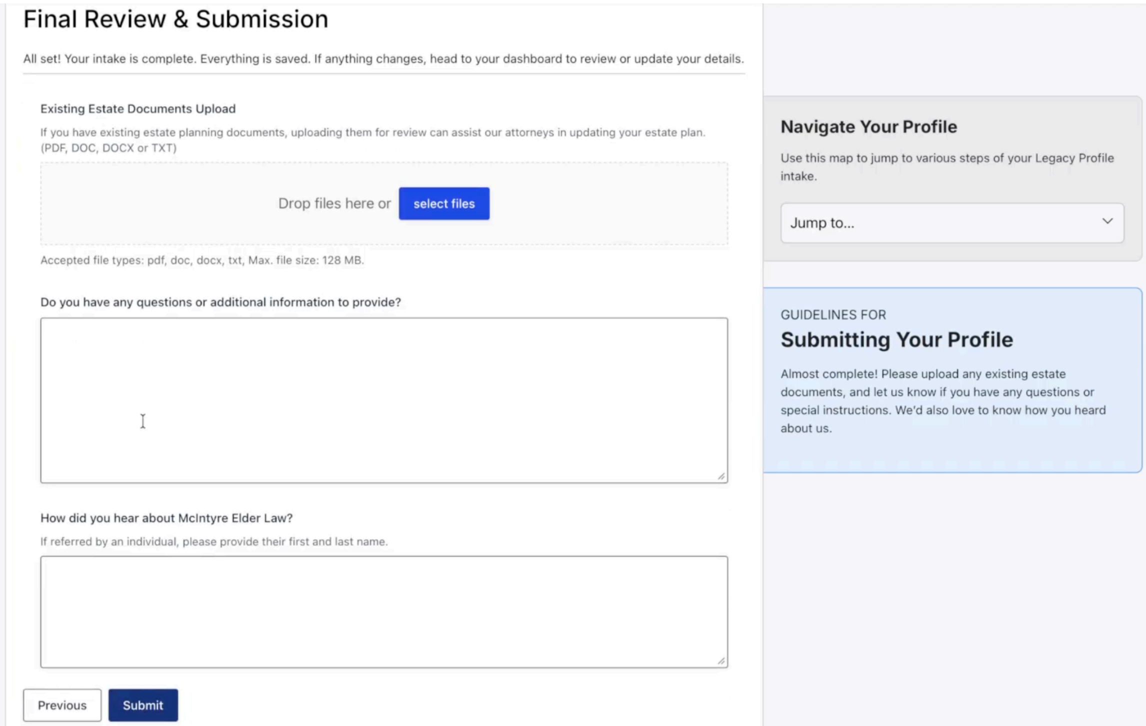
Add Insurance Policies or Annuity
Insurance Type
Life Insurance
Annuity
Other
Other
Company
Benefit or Value $
Cancel
Add Insurance Policies or Annuity



Add Property
Address (Required)
48 Foxhill
Street Address
Address Line 2
Irvine
City
California
State / Province / Region
92604-3038
ZIP / Postal Code
United States
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

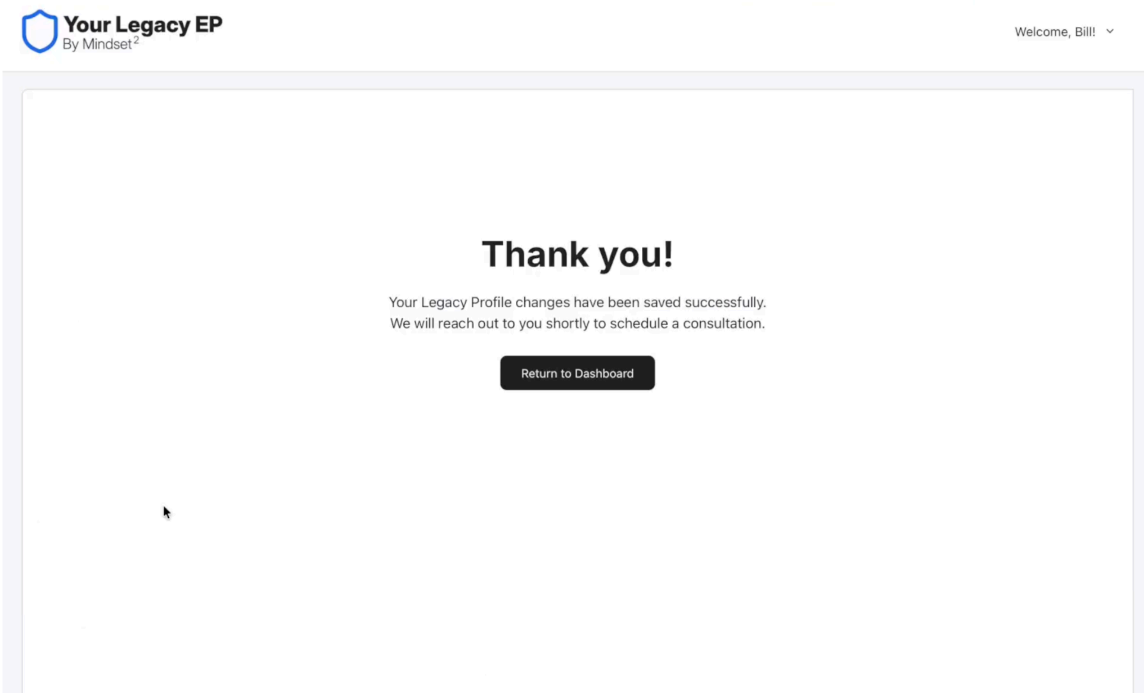
6. Uploading Documents

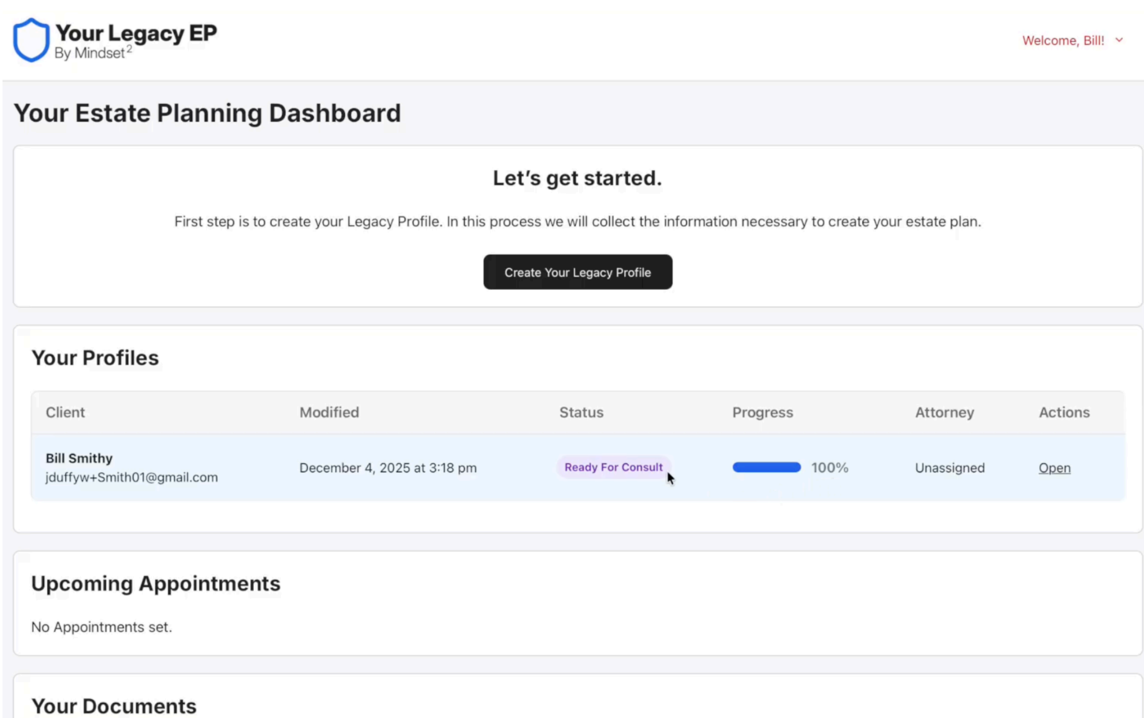
Upload prior estate documents or provide questions you would like addressed during your consult.



7. Submitting Your Profile

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





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.