Your Legacy EP – Intake Module
Internal Training Manual
Version v1.0

Onboarding Message from the CEO

Greg McIntyre, CEO & Founder — Mindset^2, Inc.

Welcome to the future of how professionals and families engage with estate planning.

Your Legacy EP by Mindset^2 represents a major step forward in transforming a historically complicated legal process into a streamlined, intuitive experience. This manual is designed to equip you with clarity, precision, and confidence.

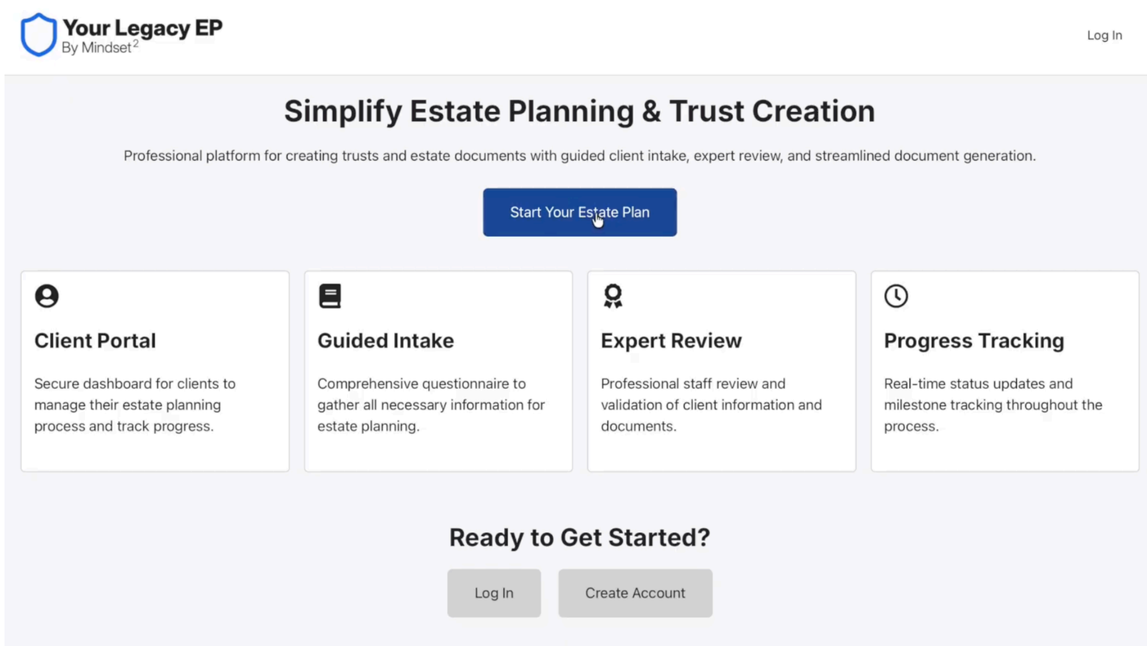
As you move through this material, remember:

- We are building a platform designed to scale nationally.
- Every intake is the start of a planning process that requires accuracy.
- Clean, complete data on the front end leads to airtight planning.
- Your work directly shapes the standard of excellence for Your Legacy EP.

Let’s continue building something extraordinary together.
— Greg

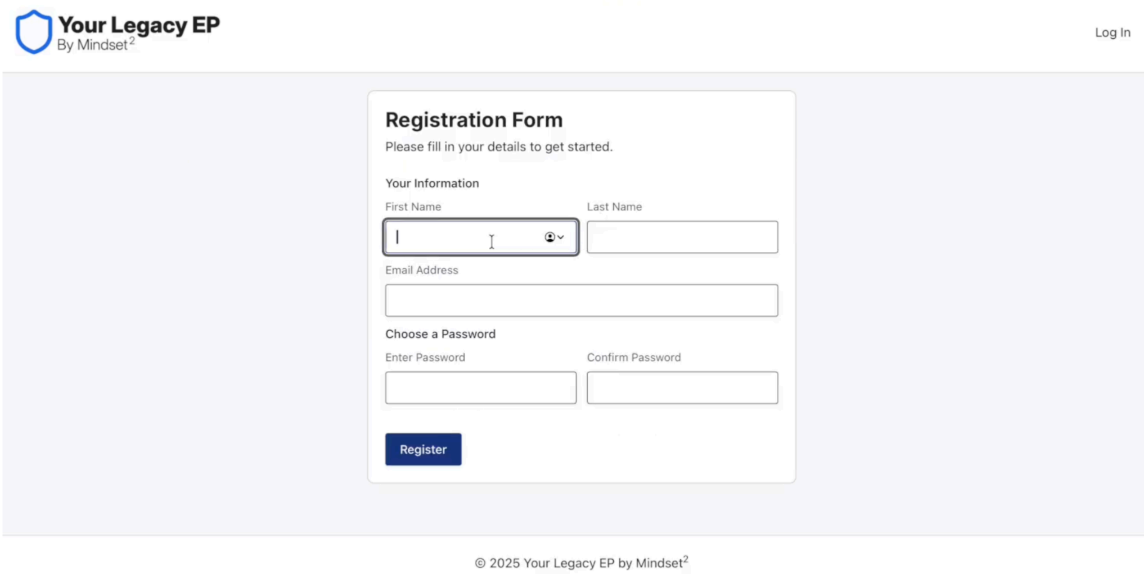
1. Overview of the Intake Workflow

The workflow begins when the client selects 'Start Your Estate Plan.' They create an account and access the dashboard, where their progress and assigned attorney are shown. The system guides them through each information section.



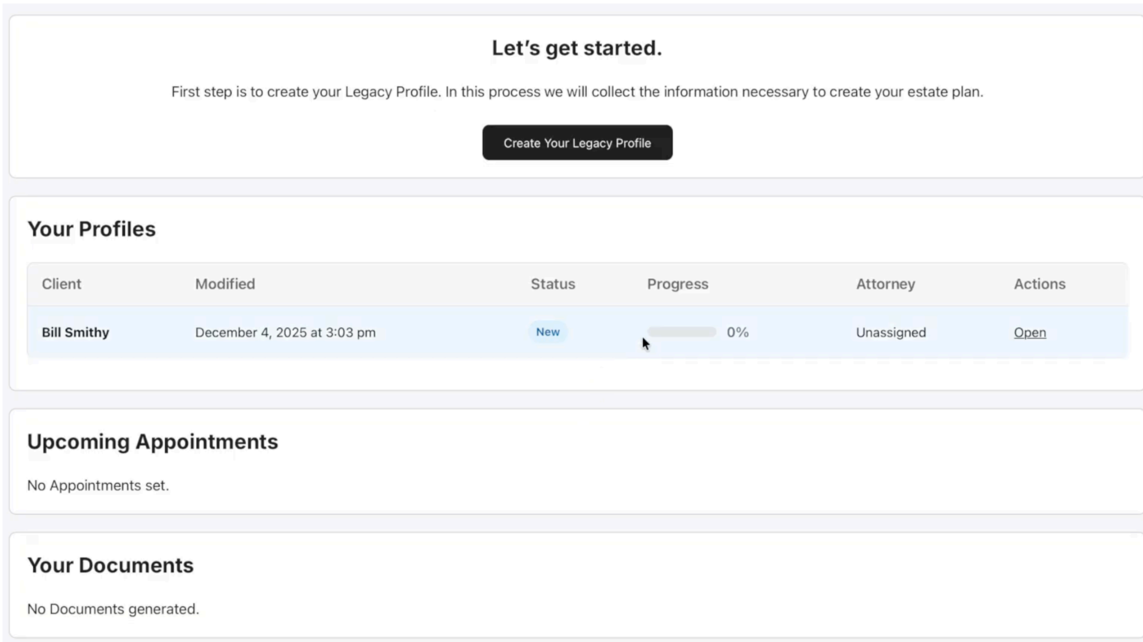
2. Logging In & Creating an Account

Clients enter an email and password. If passwords do not match, an error message prompts correction. Once created, the dashboard becomes available.



3. Dashboard & Assigned Attorney View

The dashboard displays intake progress, attorney assignment, and access to start or continue the Legacy Profile.

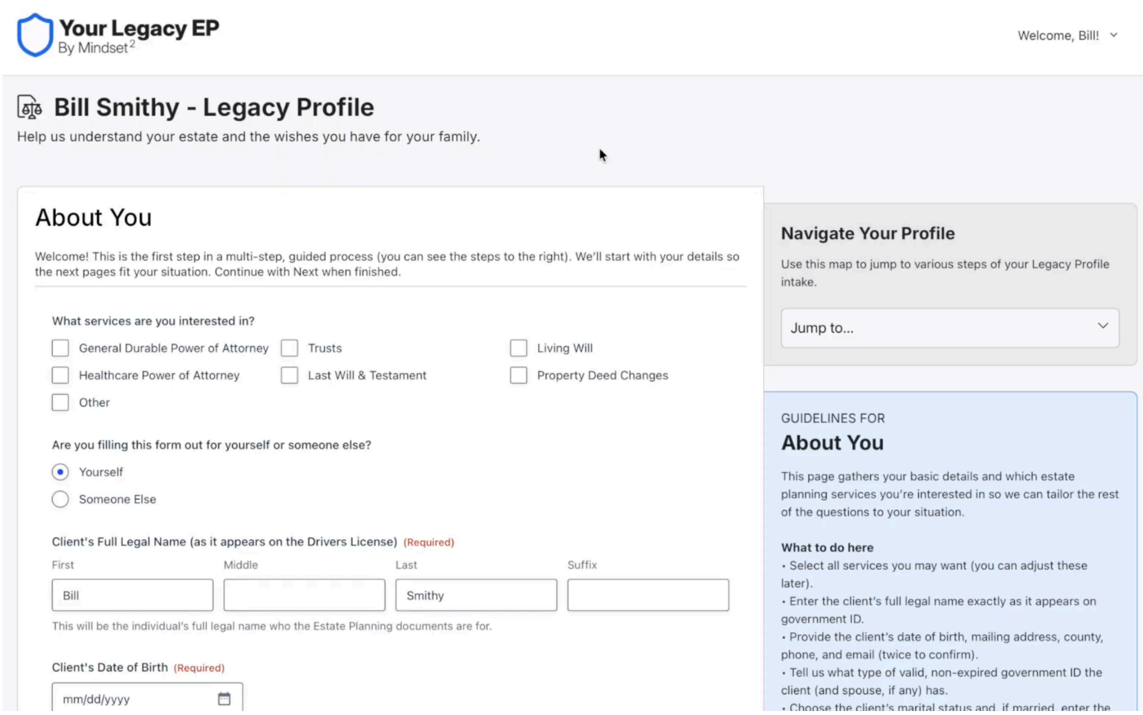


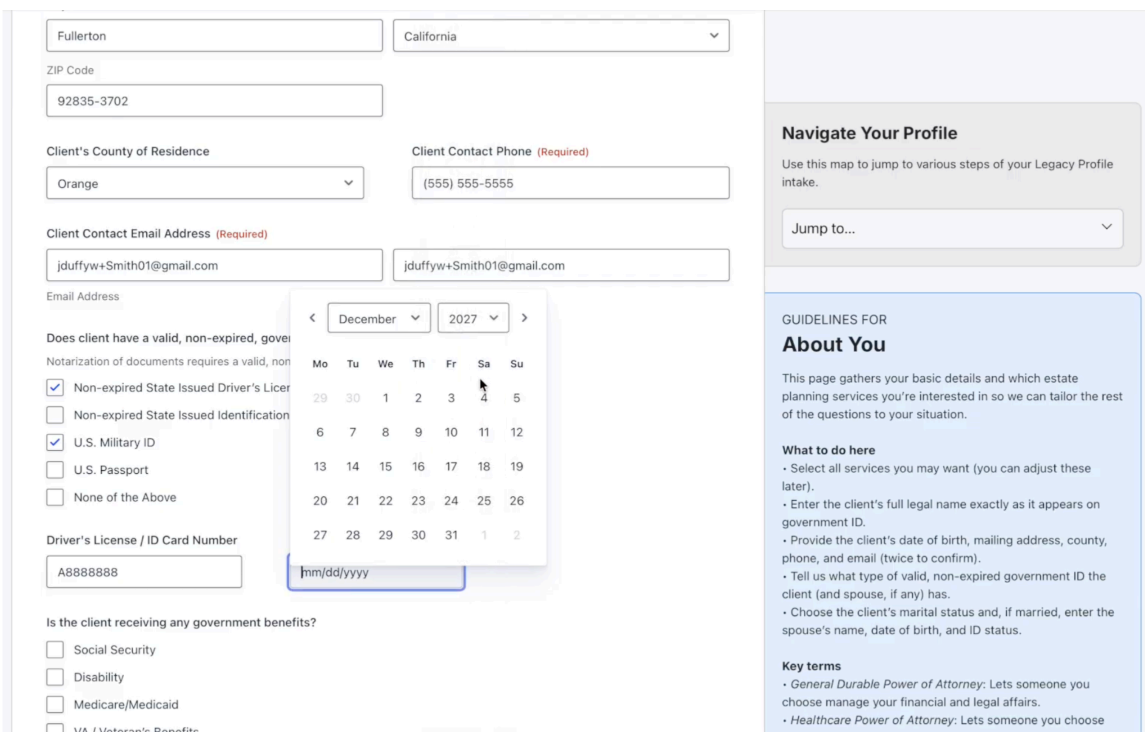
4. Service Selection & Intake Initiation

Users select services and identify whether they are filling out the form for themselves or another individual.

5. Biographical Information

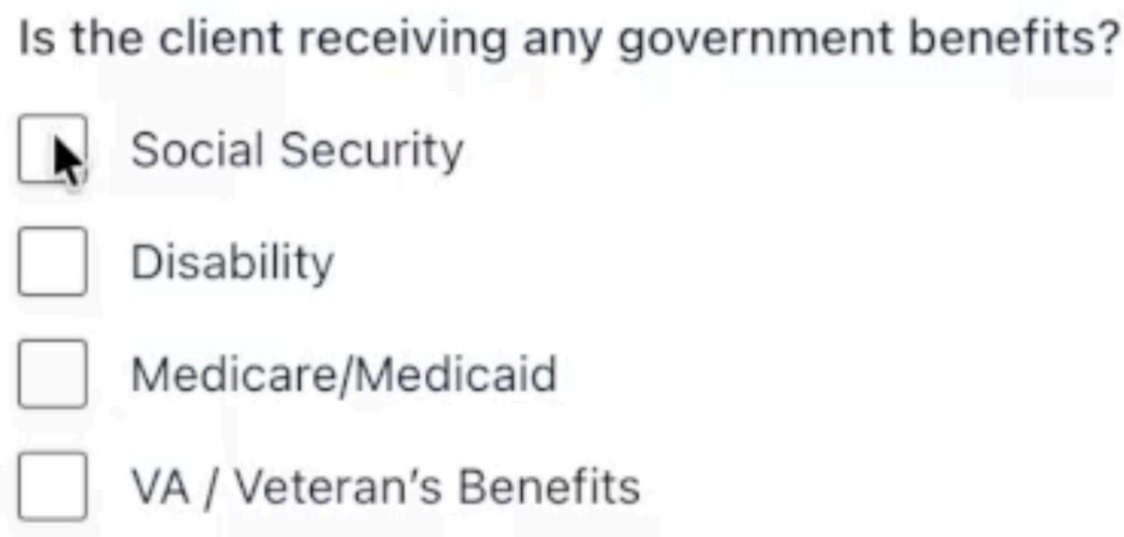
Clients enter legal name, contact information, and county. Address lookup is powered by Google for accuracy.





6. IDs & Government Benefits

Clients provide ID information for document signing and note benefit programs that may affect planning choices.



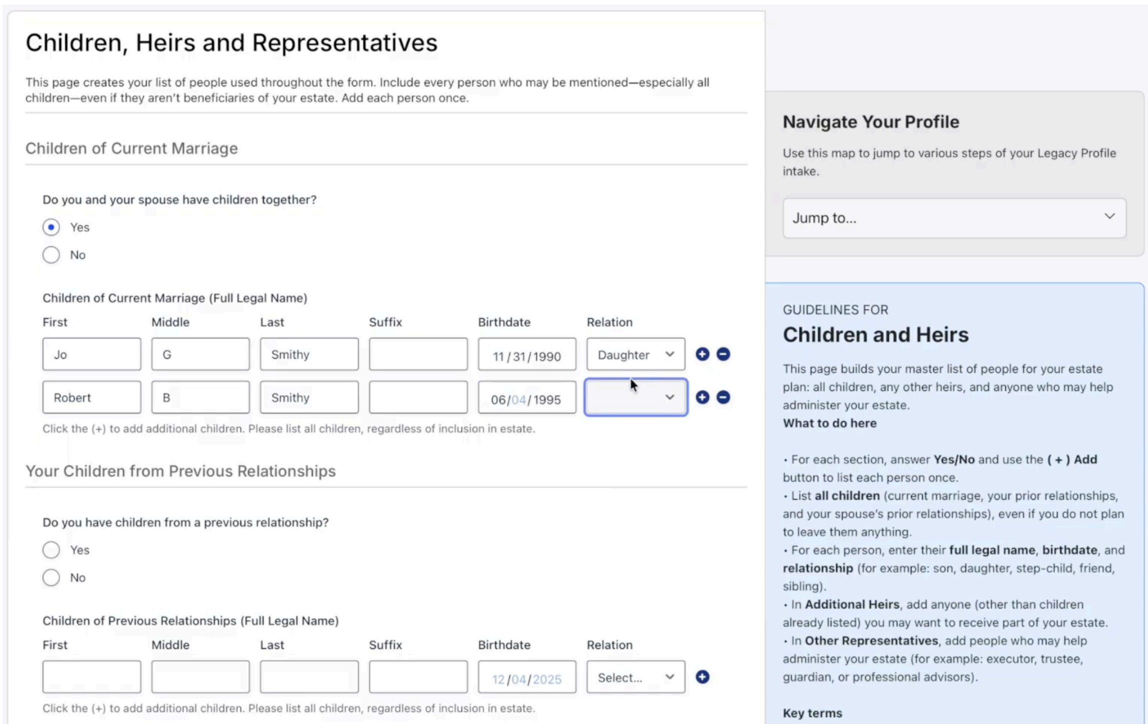
7. Marital Status & Spouse Information

Selecting 'Married' prompts data collection about the spouse to ensure accuracy in downstream planning steps.

8. Children, Heirs & Representatives

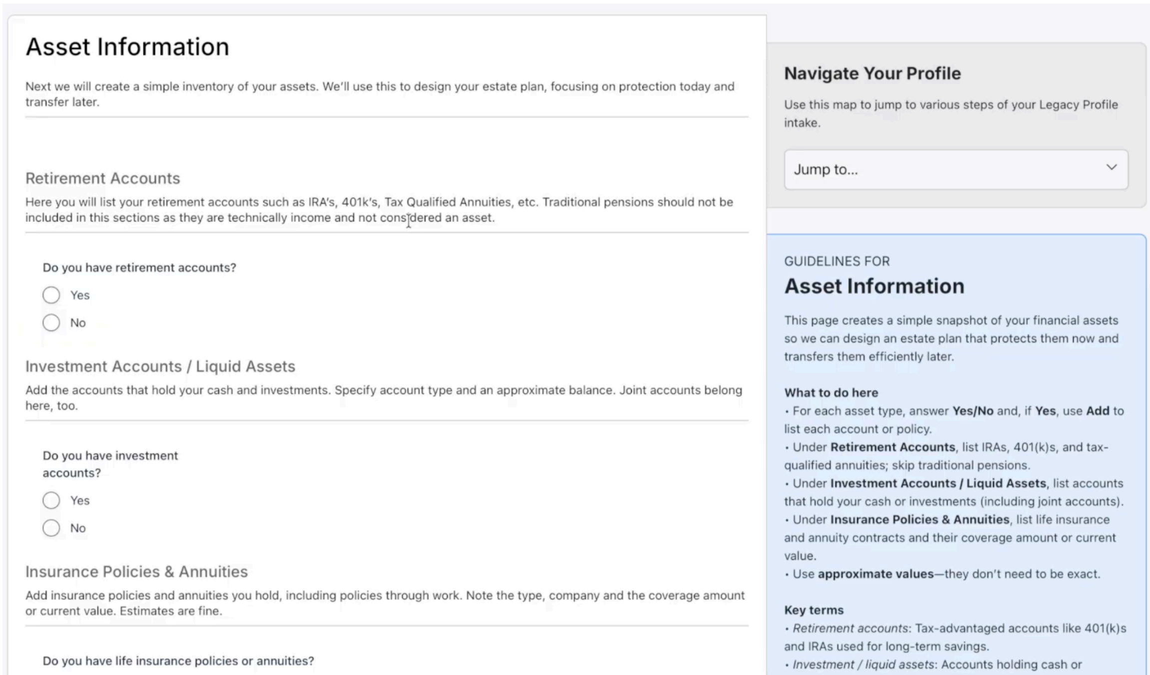
Clients enter children, heirs, and important participants such as trustees or financial advisors.

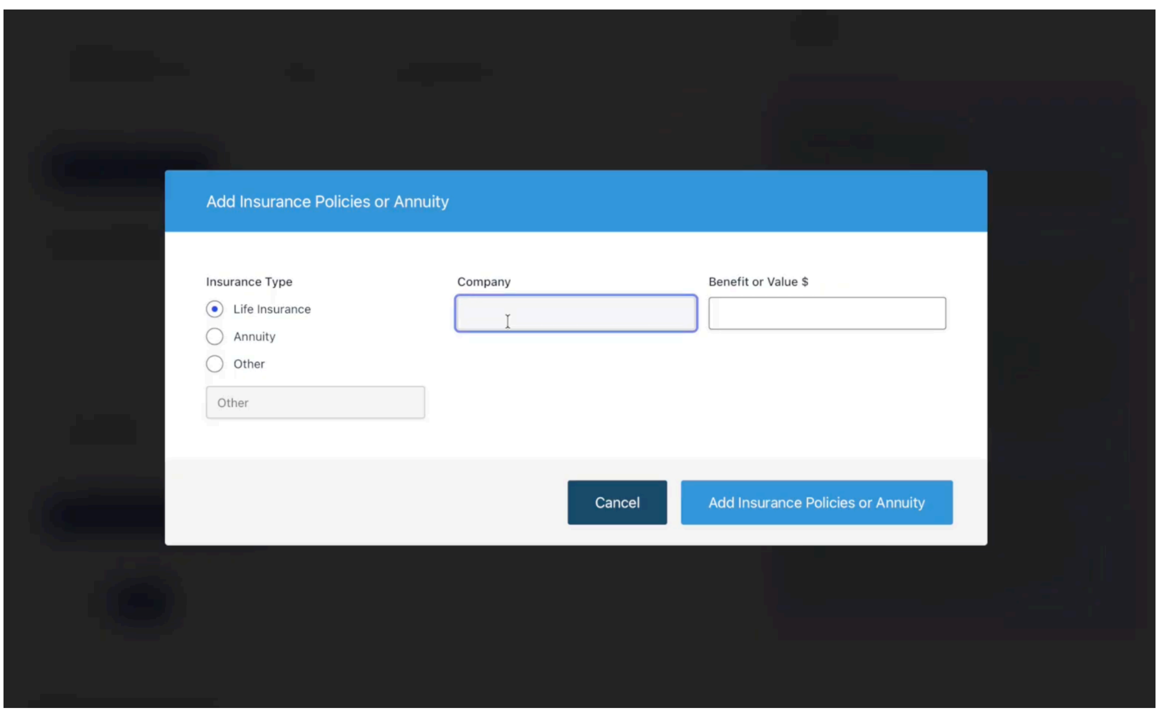
Names populated here feed later choices like fiduciaries and distributions.

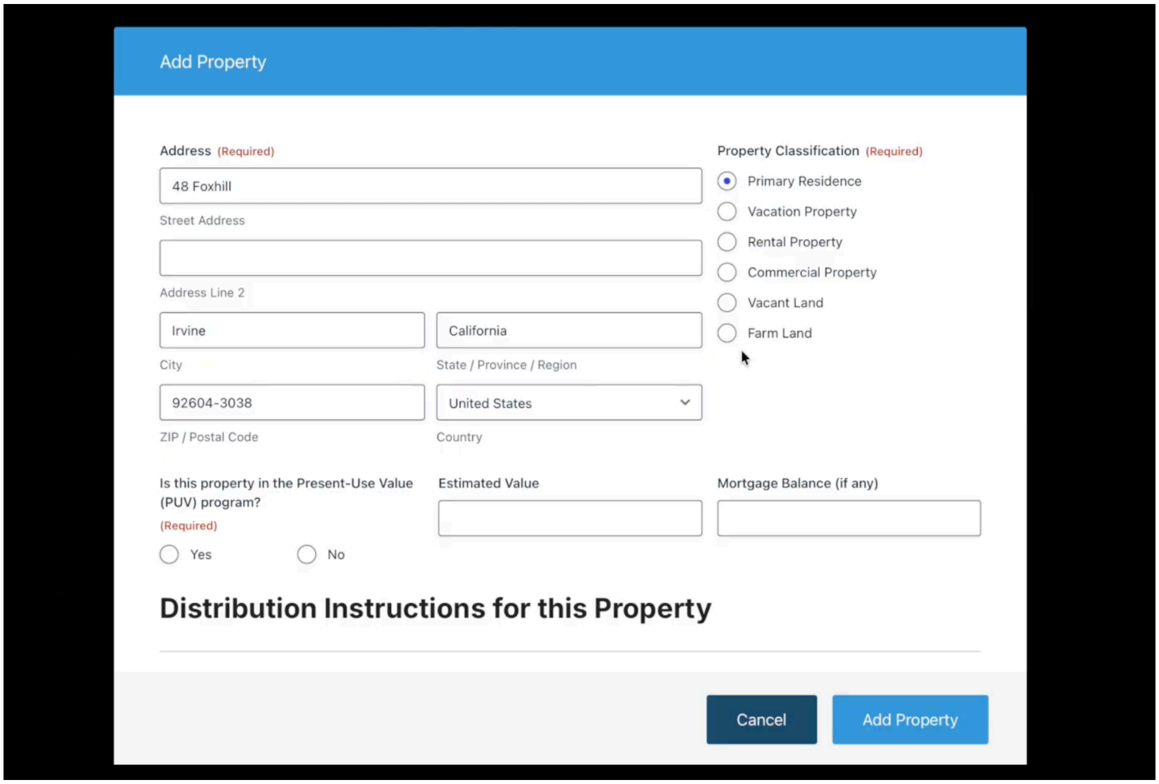


9. Asset Information

Clients list assets such as real estate, bank accounts, and insurance policies to provide planning context.

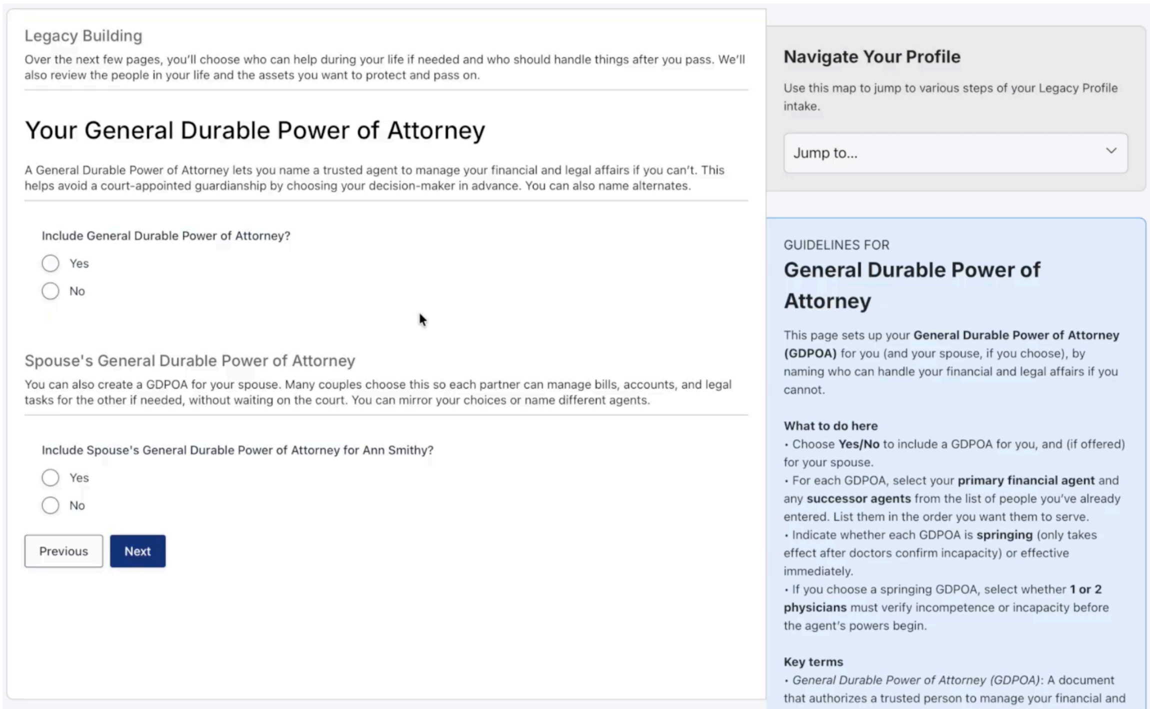


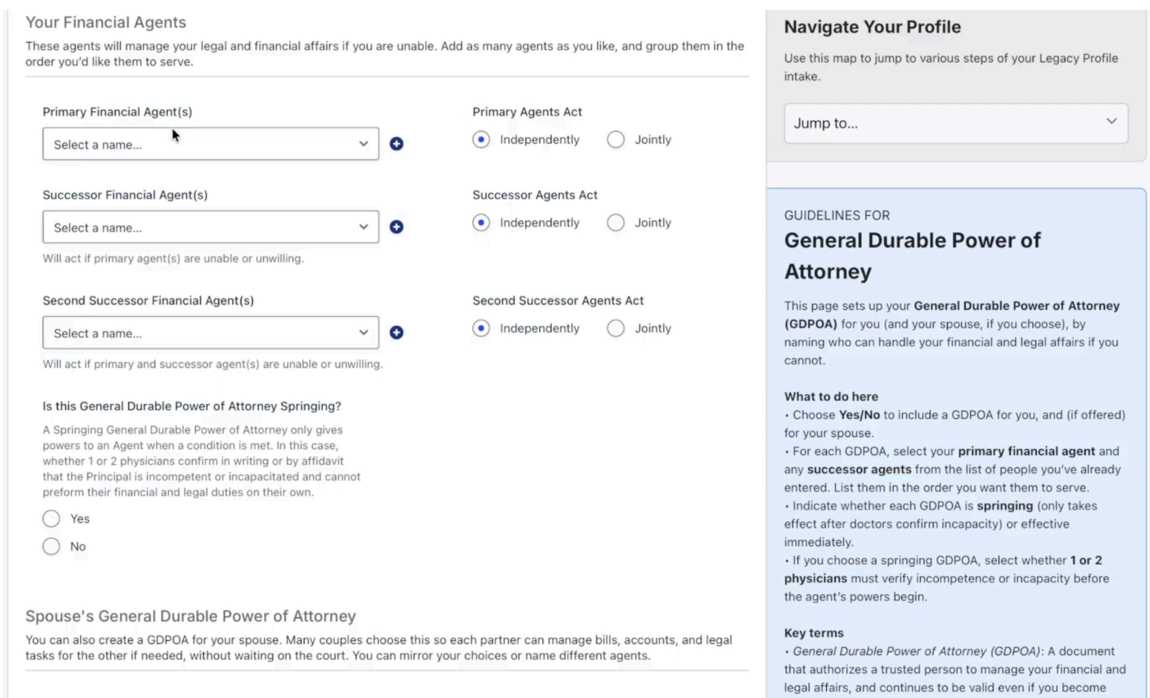



Add Property
Address (Required)
48 Foxhill
Street Address
Address Line 2
Irvine
City
California
State / Province / Region
92604-3038
ZIP / Postal Code
United States
Country
Property Classification (Required)
Primary Residence
Vacation Property
Rental Property
Commercial Property
Vacant Land
Farm Land
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

10. General Durable Power of Attorney (GDPOA)

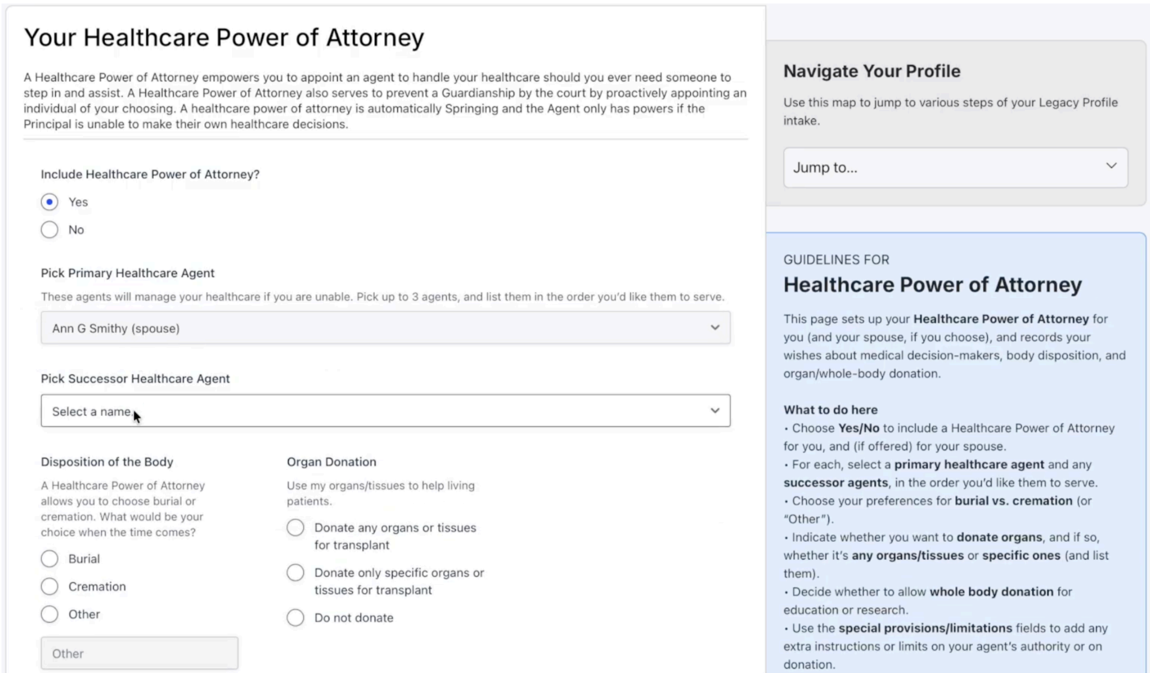
Clients select financial agents, successors, and choose between immediate or springing authority.

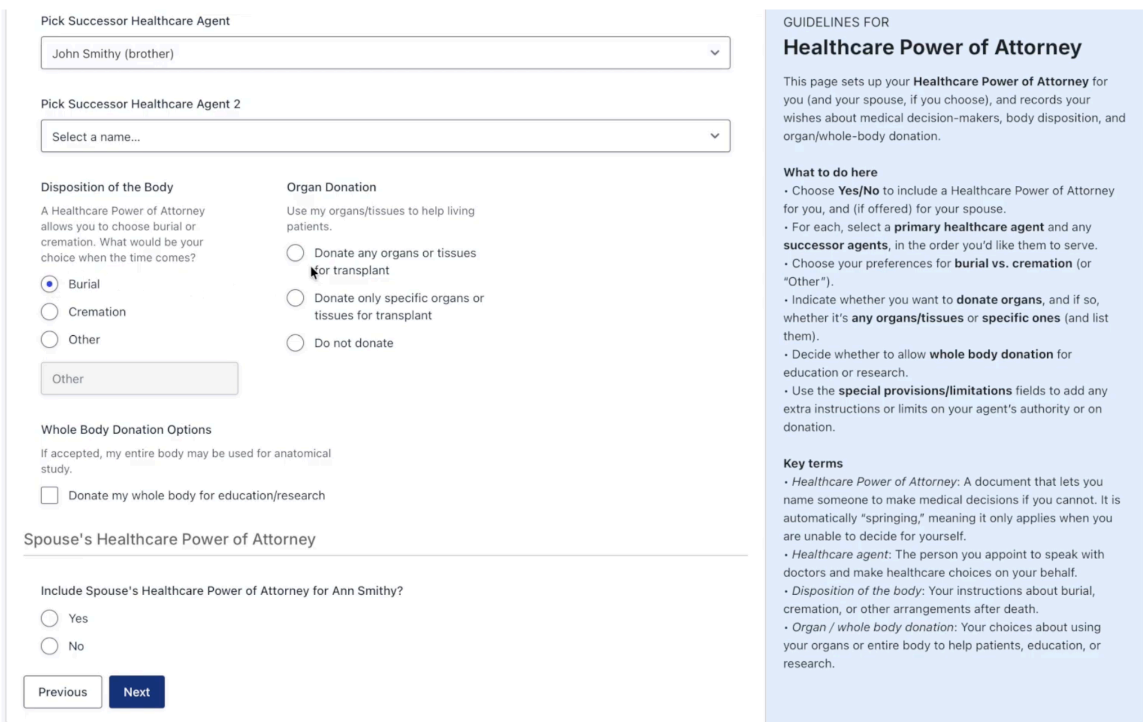




11. Healthcare Power of Attorney (HCPOA)

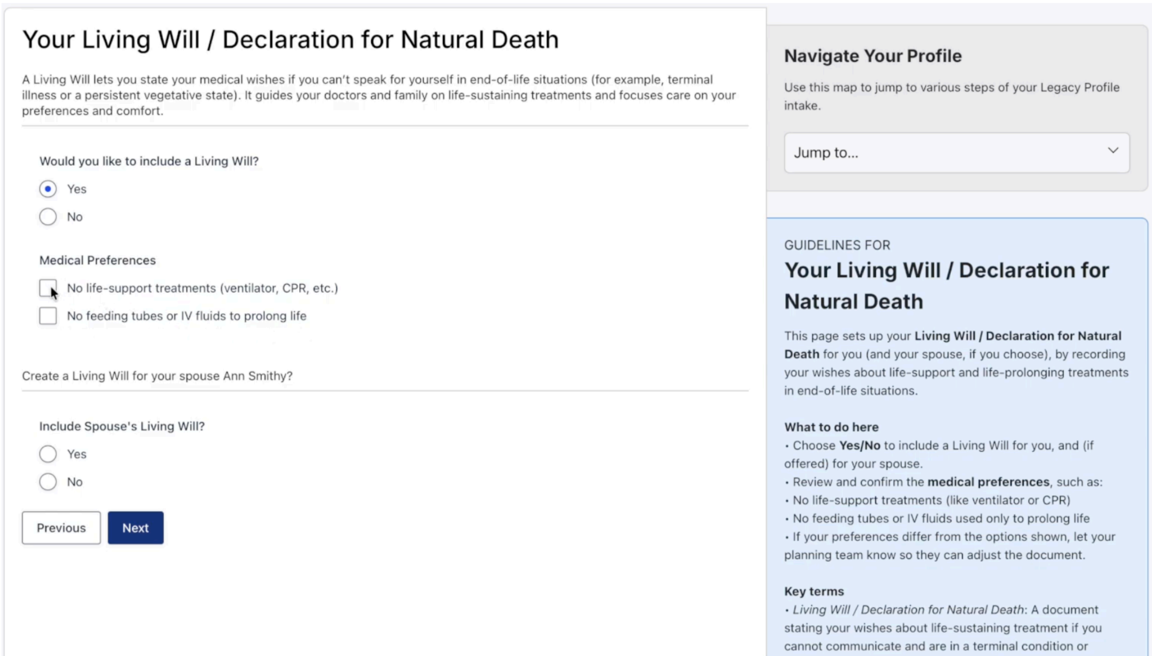
Clients choose healthcare agents, successors, body disposition, organ donation, and special provisions.





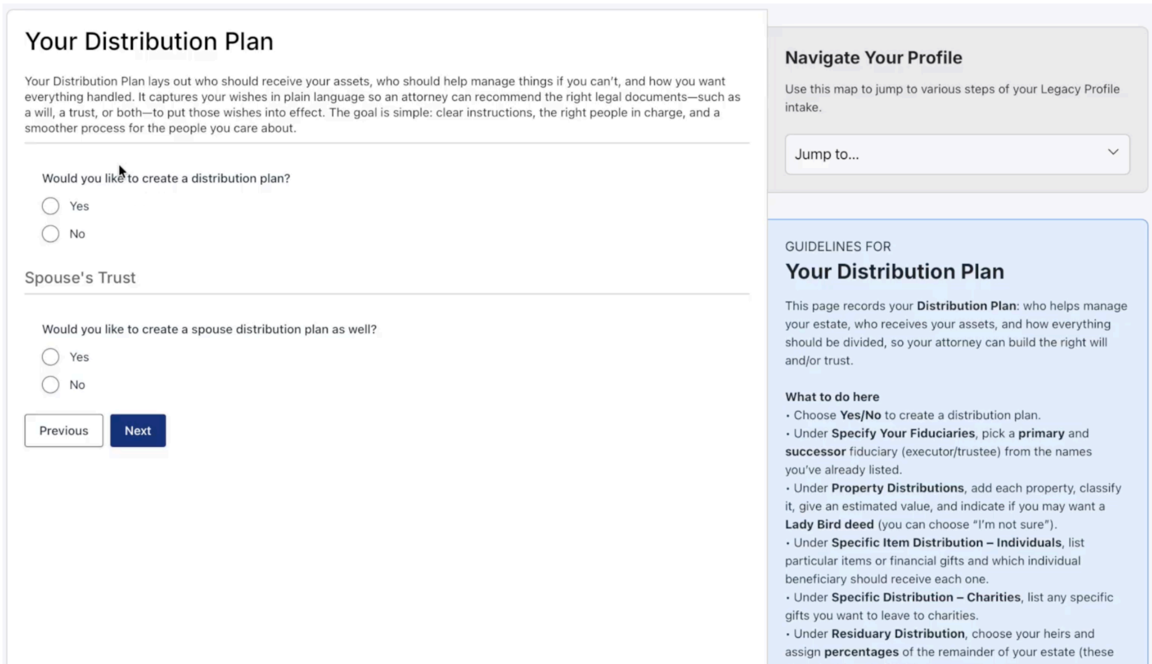
12. Living Will / Natural Death Declaration

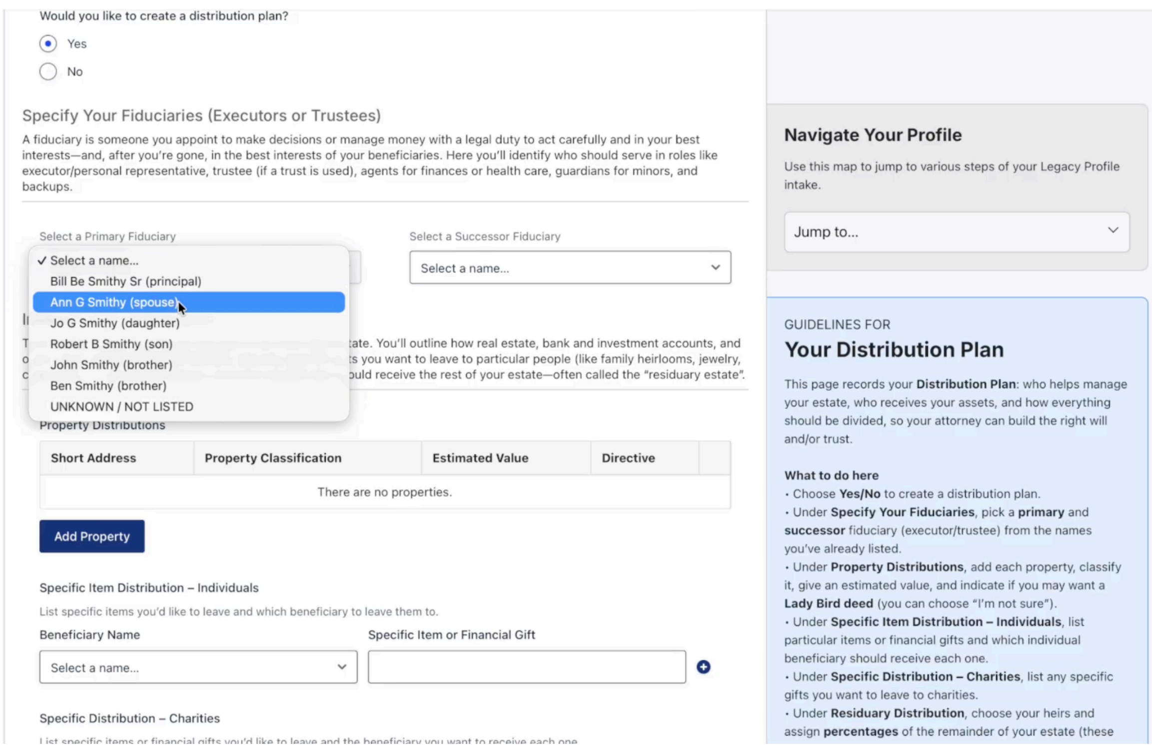
Clients make life-support decisions including ventilators, hydration, and feeding tubes.



13. Distribution Plan & Property Details

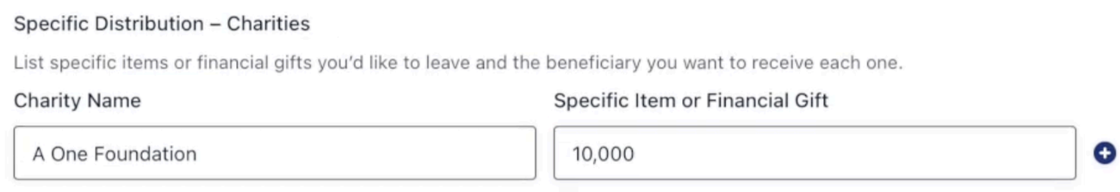
Clients enter property details using Google lookup and specify recipients. They may also list specific gifts and charitable distributions.





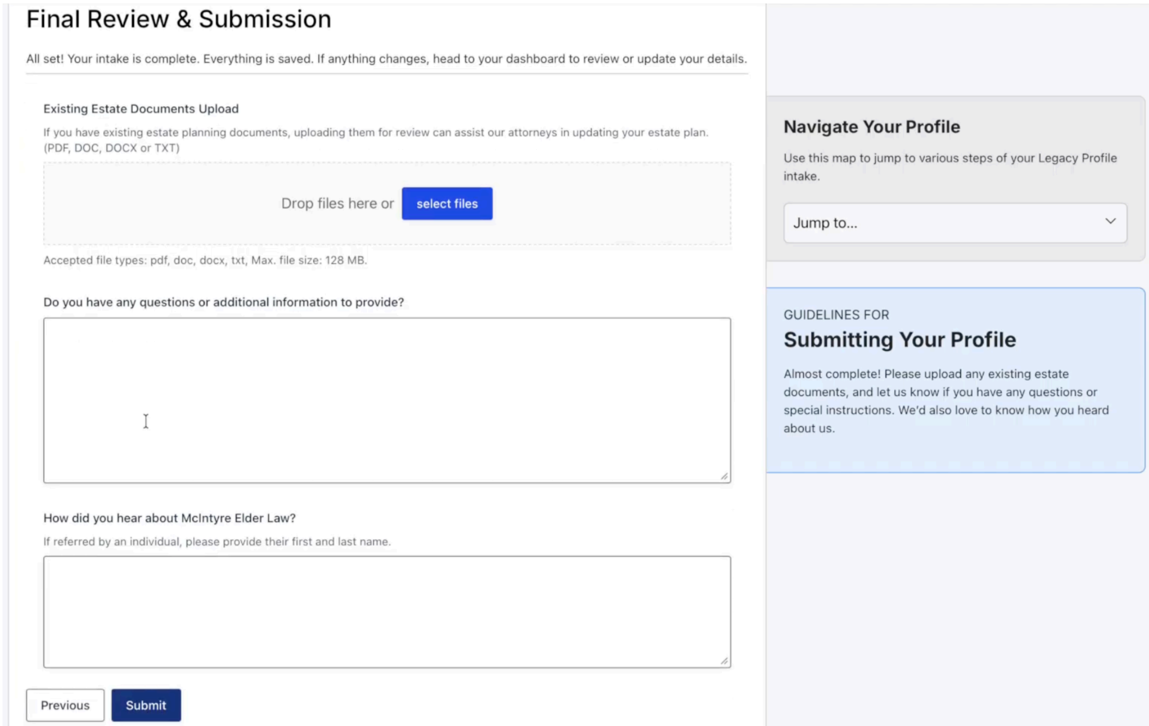
14. Specific Items, Charitable Gifts & Disinheritance

Clients specify sentimental or high-value items, optional charitable gifts, and individuals to disinherit.



15. Uploads, Final Questions & Submission

Clients upload documents, ask questions, and submit their intake. The system alerts staff to schedule the consult.



Staff Checklists

Pre-Intake:

- Confirm client identity.
- Determine if a family member is completing the intake.
- Verify ID availability.

During Intake Review:

- Confirm all vital information is entered.
- Look for blended family indicators.
- Identify potential benefit-related planning needs.

Pre-Consult Prep:

- Ensure all uploads are available.
- Flag any concerns for attorney review.

Attorney Callout Boxes

• Confirm accuracy of names and relationships.
• Identify benefit programs that require planning considerations.
• Evaluate POA and HCPOA agent suitability.
• Review distribution selections for consistency.

Full Internal FAQ

What if the client skips fields?

Staff should review omissions and address them during the consult.

How do we handle expired IDs?

Inform clients they must update IDs before signing legal documents.

How do we correct submitted data?

Use the internal workflow to note corrections and inform the attorney.

How do we access uploads?

Uploads appear in the client's document folder within the intake record.

How does intake data map to drafting?

Each field corresponds to document variables. Accuracy reduces errors.

What should staff flag?

Disinheritance intentions, disabled beneficiaries, blended families, and high-value assets.

Revision History

Version 1.0 — Initial fully written internal manual.