

Your Legacy EP – Intake Module

Internal Training Manual

Version v1.0

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Onboarding Message from the CEO

Greg McIntyre, CEO & Founder — Mindset², Inc.

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

Your Legacy EP by Mindset² 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.

The screenshot displays the 'Your Legacy EP' dashboard. At the top left is the logo 'Your Legacy EP By Mindset²'. At the top right is a 'Log In' link. The main heading is 'Simplify Estate Planning & Trust Creation', followed by the subtitle 'Professional platform for creating trusts and estate documents with guided client intake, expert review, and streamlined document generation.' A prominent blue button labeled 'Start Your Estate Plan' is centered below the subtitle. Below this are four white cards with icons and text: 'Client Portal' (person icon), 'Guided Intake' (document icon), 'Expert Review' (gears icon), and 'Progress Tracking' (clock icon). At the bottom, the text 'Ready to Get Started?' is followed by 'Log In' and 'Create Account' buttons.

Your Legacy EP
By Mindset²

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](#)

Client Portal

Secure dashboard for clients to manage their estate planning process and track progress.

Guided Intake

Comprehensive questionnaire to gather all necessary information for estate planning.

Expert Review

Professional staff review and validation of client information and documents.

Progress Tracking

Real-time status updates and milestone tracking throughout the process.

Ready to Get Started?

[Log In](#) [Create Account](#)

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.



[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. Dashboard & Assigned Attorney View

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



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

ZIP Code

Client's County of Residence

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

Calendar: 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

Navigate Your Profile

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

Jump to... ▾

GUIDELINES FOR

About You

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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 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

6. IDs & Government Benefits

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

Is the client receiving any government benefits?

- Social Security
- Disability
- Medicare/Medicaid
- VA / Veteran's Benefits

7. Marital Status & Spouse Information

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

Client's Marital Status **(Required)**

 

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.

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

9. Asset Information

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

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	Company	Benefit or Value \$
<input checked="" type="radio"/> Life Insurance	<input type="text"/>	<input type="text"/>
<input type="radio"/> Annuity		
<input type="radio"/> Other		
<input type="text"/>		

Add Property

Address (Required)

Street Address

Address Line 2

City

State / Province / Region

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

10. General Durable Power of Attorney (GDPOA)

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

Legacy Building

Over the next few pages, you'll choose who can help during your life if needed and who should handle things after you pass. We'll also review the people in your life and the assets you want to protect and pass on.

Your General Durable Power of Attorney

A General Durable Power of Attorney lets you name a trusted agent to manage your financial and legal affairs if you can't. This helps avoid a court-appointed guardianship by choosing your decision-maker in advance. You can also name alternates.

Include General Durable Power of Attorney?

Yes

No

Spouse's General Durable Power of Attorney

You can also create a GDPOA for your spouse. Many couples choose this so each partner can manage bills, accounts, and legal tasks for the other if needed, without waiting on the court. You can mirror your choices or name different agents.

Include Spouse's General Durable Power of Attorney for Ann Smithy?

Yes

No

Navigate Your Profile

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

Jump to...

GUIDELINES FOR General Durable Power of Attorney

This page sets up your **General Durable Power of Attorney (GDPOA)** for you (and your spouse, if you choose), by naming who can handle your financial and legal affairs if you cannot.

What to do here

- Choose **Yes/No** to include a GDPOA for you, and (if offered) for your spouse.
- For each GDPOA, select your **primary financial agent** and any **successor agents** from the list of people you've already entered. List them in the order you want them to serve.
- Indicate whether each GDPOA is **springing** (only takes effect after doctors confirm incapacity) or effective immediately.
- If you choose a springing GDPOA, select whether **1 or 2 physicians** must verify incompetence or incapacity before the agent's powers begin.

Key terms

- *General Durable Power of Attorney (GDPOA)*: A document that authorizes a trusted person to manage your financial and

Your Financial Agents

These agents will manage your legal and financial affairs if you are unable. Add as many agents as you like, and group them in the order you'd like them to serve.

Primary Financial Agent(s)	Primary Agents Act
<input type="text" value="Select a name..."/>	<input checked="" type="radio"/> Independently <input type="radio"/> Jointly
Successor Financial Agent(s)	Successor Agents Act
<input type="text" value="Select a name..."/>	<input checked="" type="radio"/> Independently <input type="radio"/> Jointly
Will act if primary agent(s) are unable or unwilling.	
Second Successor Financial Agent(s)	Second Successor Agents Act
<input type="text" value="Select a name..."/>	<input checked="" type="radio"/> Independently <input type="radio"/> Jointly
Will act if primary and successor agent(s) are unable or unwilling.	

Is this General Durable Power of Attorney Springing?

A Springing General Durable Power of Attorney only gives powers to an Agent when a condition is met. In this case, whether 1 or 2 physicians confirm in writing or by affidavit that the Principal is incompetent or incapacitated and cannot perform their financial and legal duties on their own.

Yes

No

Spouse's General Durable Power of Attorney

You can also create a GDPOA for your spouse. Many couples choose this so each partner can manage bills, accounts, and legal tasks for the other if needed, without waiting on the court. You can mirror your choices or name different agents.

Navigate Your Profile

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

Jump to...

GUIDELINES FOR General Durable Power of Attorney

This page sets up your **General Durable Power of Attorney (GDPOA)** for you (and your spouse, if you choose), by naming who can handle your financial and legal affairs if you cannot.

What to do here

- Choose **Yes/No** to include a GDPOA for you, and (if offered) for your spouse.
- For each GDPOA, select your **primary financial agent** and any **successor agents** from the list of people you've already entered. List them in the order you want them to serve.
- Indicate whether each GDPOA is **springing** (only takes effect after doctors confirm incapacity) or effective immediately.
- If you choose a springing GDPOA, select whether **1 or 2 physicians** must verify incompetence or incapacity before the agent's powers begin.

Key terms

- *General Durable Power of Attorney (GDPOA)*: A document that authorizes a trusted person to manage your financial and legal affairs, and continues to be valid even if you become

11. Healthcare Power of Attorney (HCP OA)

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

Your Healthcare Power of Attorney

A Healthcare Power of Attorney empowers you to appoint an agent to handle your healthcare should you ever need someone to step in and assist. A Healthcare Power of Attorney also serves to prevent a Guardianship by the court by proactively appointing an individual of your choosing. A healthcare power of attorney is automatically Springing and the Agent only has powers if the Principal is unable to make their own healthcare decisions.

Include Healthcare Power of Attorney?

Yes
 No

Pick Primary Healthcare Agent
These agents will manage your healthcare if you are unable. Pick up to 3 agents, and list them in the order you'd like them to serve.

Ann G Smyth (spouse) ▼

Pick Successor Healthcare Agent

Select a name ▼

Disposition of the Body
A Healthcare Power of Attorney allows you to choose burial or cremation. What would be your choice when the time comes?

Burial
 Cremation
 Other

Other

Organ Donation
Use my organs/tissues to help living patients.

Donate any organs or tissues for transplant
 Donate only specific organs or tissues for transplant
 Do not donate

Pick Successor Healthcare Agent

John Smyth (brother) ▼

Pick Successor Healthcare Agent 2

Select a name... ▼

Disposition of the Body
A Healthcare Power of Attorney allows you to choose burial or cremation. What would be your choice when the time comes?

Burial
 Cremation
 Other

Other

Organ Donation
Use my organs/tissues to help living patients.

Donate any organs or tissues for transplant
 Donate only specific organs or tissues for transplant
 Do not donate

Whole Body Donation Options
If accepted, my entire body may be used for anatomical study.

Donate my whole body for education/research

Spouse's Healthcare Power of Attorney

Include Spouse's Healthcare Power of Attorney for Ann Smyth?

Yes
 No

Previous Next

Navigate Your Profile

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

Jump to... ▼

GUIDELINES FOR Healthcare Power of Attorney

This page sets up your **Healthcare Power of Attorney** for you (and your spouse, if you choose), and records your wishes about medical decision-makers, body disposition, and organ/whole-body donation.

What to do here

- Choose **Yes/No** to include a Healthcare Power of Attorney for you, and (if offered) for your spouse.
- For each, select a **primary healthcare agent** and any **successor agents**, in the order you'd like them to serve.
- Choose your preferences for **burial vs. cremation** (or "Other").
- Indicate whether you want to **donate organs**, and if so, whether it's **any organs/tissues** or **specific ones** (and list them).
- Decide whether to allow **whole body donation** for education or research.
- Use the **special provisions/limitations** fields to add any extra instructions or limits on your agent's authority or on donation.

GUIDELINES FOR Healthcare Power of Attorney

This page sets up your **Healthcare Power of Attorney** for you (and your spouse, if you choose), and records your wishes about medical decision-makers, body disposition, and organ/whole-body donation.

What to do here

- Choose **Yes/No** to include a Healthcare Power of Attorney for you, and (if offered) for your spouse.
- For each, select a **primary healthcare agent** and any **successor agents**, in the order you'd like them to serve.
- Choose your preferences for **burial vs. cremation** (or "Other").
- Indicate whether you want to **donate organs**, and if so, whether it's **any organs/tissues** or **specific ones** (and list them).
- Decide whether to allow **whole body donation** for education or research.
- Use the **special provisions/limitations** fields to add any extra instructions or limits on your agent's authority or on donation.

Key terms

- **Healthcare Power of Attorney:** A document that lets you name someone to make medical decisions if you cannot. It is automatically "springing," meaning it only applies when you are unable to decide for yourself.
- **Healthcare agent:** The person you appoint to speak with doctors and make healthcare choices on your behalf.
- **Disposition of the body:** Your instructions about burial, cremation, or other arrangements after death.
- **Organ / whole body donation:** Your choices about using your organs or entire body to help patients, education, or research.

12. Living Will / Natural Death Declaration

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

Your Living Will / Declaration for Natural Death

A Living Will lets you state your medical wishes if you can't speak for yourself in end-of-life situations (for example, terminal illness or a persistent vegetative state). It guides your doctors and family on life-sustaining treatments and focuses care on your preferences and comfort.

Would you like to include a Living Will?

Yes
 No

Medical Preferences

No life-support treatments (ventilator, CPR, etc.)
 No feeding tubes or IV fluids to prolong life

Create a Living Will for your spouse Ann Smithy?

Include Spouse's Living Will?

Yes
 No

Navigate Your Profile

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

Jump to... ▼

GUIDELINES FOR Your Living Will / Declaration for Natural Death

This page sets up your **Living Will / Declaration for Natural Death** for you (and your spouse, if you choose), by recording your wishes about life-support and life-prolonging treatments in end-of-life situations.

What to do here

- Choose **Yes/No** to include a Living Will for you, and (if offered) for your spouse.
- Review and confirm the **medical preferences**, such as:
 - No life-support treatments (like ventilator or CPR)
 - No feeding tubes or IV fluids used only to prolong life
- If your preferences differ from the options shown, let your planning team know so they can adjust the document.

Key terms

- *Living Will / Declaration for Natural Death*: A document stating your wishes about life-sustaining treatment if you cannot communicate and are in a terminal condition or

13. Distribution Plan & Property Details

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

Your Distribution Plan

Your Distribution Plan lays out who should receive your assets, who should help manage things if you can't, and how you want everything handled. It captures your wishes in plain language so an attorney can recommend the right legal documents—such as a will, a trust, or both—to put those wishes into effect. The goal is simple: clear instructions, the right people in charge, and a smoother process for the people you care about.

Would you like to create a distribution plan?

Yes
 No

Spouse's Trust

Would you like to create a spouse distribution plan as well?

Yes
 No

Navigate Your Profile

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

Jump to...

GUIDELINES FOR Your Distribution Plan

This page records your **Distribution Plan**: who helps manage your estate, who receives your assets, and how everything should be divided, so your attorney can build the right will and/or trust.

What to do here

- Choose **Yes/No** to create a distribution plan.
- Under **Specify Your Fiduciaries**, pick a **primary** and **successor** fiduciary (executor/trustee) from the names you've already listed.
- Under **Property Distributions**, add each property, classify it, give an estimated value, and indicate if you may want a **Lady Bird deed** (you can choose "I'm not sure").
- Under **Specific Item Distribution – Individuals**, list particular items or financial gifts and which individual beneficiary should receive each one.
- Under **Specific Distribution – Charities**, list any specific gifts you want to leave to charities.
- Under **Residuary Distribution**, choose your heirs and assign **percentages** of the remainder of your estate (these

Would you like to create a distribution plan?

Yes
 No

Specify Your Fiduciaries (Executors or Trustees)

A fiduciary is someone you appoint to make decisions or manage money with a legal duty to act carefully and in your best interests—and, after you're gone, in the best interests of your beneficiaries. Here you'll identify who should serve in roles like executor/personal representative, trustee (if a trust is used), agents for finances or health care, guardians for minors, and backups.

Select a Primary Fiduciary

✓ Select a name...

Bill Be Smithy Sr (principal)
Ann G Smithy (spouse)
Jo G Smithy (daughter)
Robert B Smithy (son)
John Smithy (brother)
Ben Smithy (brother)
UNKNOWN / NOT LISTED

Select a Successor Fiduciary

Select a name...

Property Distributions

Short Address	Property Classification	Estimated Value	Directive
There are no properties.			

Specific Item Distribution – Individuals

List specific items you'd like to leave and which beneficiary to leave them to.

Beneficiary Name	Specific Item or Financial Gift
Select a name...	

Specific Distribution – Charities

List specific items or financial gifts you'd like to leave and the beneficiary you want to receive each one.

Navigate Your Profile

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

Jump to...

GUIDELINES FOR Your Distribution Plan

This page records your **Distribution Plan**: who helps manage your estate, who receives your assets, and how everything should be divided, so your attorney can build the right will and/or trust.

What to do here

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- Under **Specify Your Fiduciaries**, pick a **primary** and **successor** fiduciary (executor/trustee) from the names you've already listed.
- Under **Property Distributions**, add each property, classify it, give an estimated value, and indicate if you may want a **Lady Bird deed** (you can choose "I'm not sure").
- Under **Specific Item Distribution – Individuals**, list particular items or financial gifts and which individual beneficiary should receive each one.
- Under **Specific Distribution – Charities**, list any specific gifts you want to leave to charities.
- Under **Residuary Distribution**, choose your heirs and assign **percentages** of the remainder of your estate (these

14. Specific Items, Charitable Gifts & Disinheritance

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

Specific Distribution – Charities

List specific items or financial gifts you'd like to leave and the beneficiary you want to receive each one.

Charity Name

Specific Item or Financial Gift

A One Foundation	10,000	
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15. Uploads, Final Questions & Submission

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

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.