# Your Legacy EP – Client FAQ (Intake & Setup)



## How long does the intake take?

Most people can complete the intake in about 20–40 minutes, depending on how much information they have available when they start. You can always save your progress and come back later.

## Can I stop and come back later?

Yes. You can log out at any time and log back in later using your email and password. Your progress will be saved.

## What if I don't know all the answers yet?

Do your best with the information you have. You can skip some non-required fields and discuss details with your advisor or attorney during your meeting.

## Can a family member help me fill this out?

Absolutely. A trusted family member can help you enter information, or complete the form on your behalf, as long as you review and approve what is entered.

## Is my information secure?

Your Legacy EP by Mindset² is designed with security in mind. Your information is stored and transmitted using industry-standard protections.

## What happens after I click Submit?

Your information is sent securely to the team that will review your intake and prepare for your consult. You will be contacted to confirm or schedule your meeting if this has not already been arranged.

## Can I change something later?

Yes. If you realize that something needs to be updated, let your advisor or attorney know. Updates can either be made directly in the system or reflected in your planning documents before they are finalized.