CLAIM MY LEGACY™

THE CLAIM MY LEGACY ACADEMY™

CML-ACA-120 | MODULE 5 RESOURCE

APPROVED STORY PRACTICE GUIDE

Module 5 | Relate With a Story

Purpose

This guide gives Legacy Specialists an authoritative conversation version of each approved Stage 2 core story. Learn the facts and teaching point. Do not memorize another person's performance or invent details.

THE STORY IS NOT THE DESTINATION. IT IS A BRIDGE BACK TO THE FAMILY.

How to use this guide

- Listen before choosing a story.
- Use a story only when it helps the family understand something relevant.
- Keep the story to 60–90 seconds.
- Make one teaching point, then return the conversation to the family.
- Tell only the approved facts. Do not embellish, speculate, or use tragedy as leverage.

Story 1 | Dr. Dave's Grandparents

Founder story. A non-founder must attribute this story to Dr. Dave and may never present it as personal history.

60–90 SECONDS. ONE STORY. ONE POINT. RETURN TO THE FAMILY.

Approved conversation version

Claim My Legacy began with a promise Dr. Dave made after his own family went through probate. Dr. Dave grew up next door to his grandparents. He remembers their home, the piano, his grandmother baking, and Christmases together. His grandparents had a will and, like many families, believed they had taken care of things. But after they died, the family learned that having a will does not necessarily keep a family out of probate. Dr. Dave has said that experience left him thinking, 'If I could help another family avoid what ours went through, I would.' That promise eventually became Claim My Legacy.

Teaching point

A will does not necessarily keep a family out of probate. Planning should be evaluated by the outcome the family experiences, not merely by whether a document exists.

Return question

"What would you want your family to understand before they ever had to face a situation like that?"

Guardrails

- Say "Dr. Dave has shared…" or "Claim My Legacy began with…"
- Do not say "my grandparents" unless you are Dr. Dave.
- Do not add facts about the probate that are not included in the approved version.

Story 2 | Tom & Sheila

Approved teaching story. Preserve the approved facts and land on delay, not tragedy.

60–90 SECONDS. ONE STORY. ONE POINT. RETURN TO THE FAMILY.

Approved conversation version

> *Tom was 46 years old. He owned a successful hardware store, employed about 40 people, and had built a good life with Sheila. Tom knew they needed to complete their estate planning, but there was always another reason to wait: after Christmas, after New Year's, after Valentine's Day. Then came March, and Tom died. Tom did not believe planning was unimportant, and he did not love Sheila any less. He thought he had more time. Because of how things were arranged, the family had to deal with probate. An inventory had to be created, the court became involved, and Sheila eventually had to leave the home they had built together.*

Teaching point

Good intentions and love do not complete planning. Delay can leave a family unprepared when life changes unexpectedly.

Return question

"What do you think Tom would have done differently if he could have seen this coming?"

Guardrails

- Do not make Tom's death more graphic or dramatic.
- Do not use the story to predict that something similar will happen to the listener.
- Do not turn every possible lesson into a lecture. The point here is delay.

Story 3 | The Trust Funding Phone Call

Founder experience. A non-founder must attribute the call to Dr. Dave and keep the caller anonymous.

60–90 SECONDS. ONE STORY. ONE POINT. RETURN TO THE FAMILY.

Approved conversation version

Dr. Dave received a phone call from a man whose father had died. The father left a trust binder, but the son could not find the Certificate of Trust the bank requested. More importantly, he said, 'I've read my dad's trust several times, and I can't find any of his assets in it.' The son later found a signed document showing that his father had received a funding kit and had been told the trust needed to be funded. We do not know why the father did not complete that step, and we should not guess. We only know what the son reported next: his father's estate went into probate. His father had created a trust, signed documents, and kept a binder, but his son was still trying to determine what to do.

Teaching point

Creating a trust and implementing it are different steps. Signed documents alone do not establish that every intended asset has been connected to the plan.

Return question

"How confident are you that your trust has been fully implemented?"

Guardrails

- Say "Dr. Dave received a phone call…" rather than claiming the call as your own.
- Do not identify the caller or his father.
- Do not speculate about why the father did not fund the trust.
- Do not declare that every unfunded asset will require probate.
- Land on: Create it. Fund it. Keep it current.

Story Practice

Choose one approved story and deliver it in 60–90 seconds. Your evaluator will assess whether it is:

- Accurate
- Brief
- Natural
- Family-centered
- Free from fear amplification
- Properly attributed
- Ended with a useful return question

Three-Part Debrief™

1. What worked?

_____

2. What would you change?

_____

3. What will you do next time?

_____

© 2026 Claim My Legacy. All Rights Reserved.
This publication, including its original text, organization, checklists, graphics and educational presentation, is proprietary to Claim My Legacy. No reproduction, adaptation, resale or commercial distribution is permitted without written authorization.