



CML-FLR-102

LEGACY SPECIALIST FAMILY LEGACY REVIEW™ FACILITATION GUIDE

V1.2

HOW TO GUIDE THE CONVERSATION, UNCOVER PLANNING GAPS,
AND HELP A FAMILY DECIDE WHAT TO DO NEXT

For Claim My Legacy™ Legacy Specialists

Training teaches. Practice develops. Certification proves readiness.

The Purpose of the Family Legacy Review™

The Family Legacy Review™ is not a sales presentation. It is not an application. It is not a checklist you rush through so you can get to the price.

It is a guided conversation designed to help a family answer one important question:

“If something happened to me today, would the people I love be protected the way I intend?”

Your job as a Legacy Specialist is to help the family discover the answer.

Your Role During the Meeting

You complete the Family Legacy Review™. The family does not. Sit with them, ask the questions conversationally, listen carefully, and record what they tell you.

**THE DOCUMENT SHOULD GUIDE THE CONVERSATION.
IT SHOULD NEVER BECOME THE CONVERSATION.**

Do not bury your head in the packet. Maintain eye contact. Listen for what matters behind the answer. When someone says something important, slow down and explore it.

Family: “My daughter handles all of that.”

Legacy Specialist: “Tell me a little more about that. If something happened to you tonight, would your daughter actually have the legal authority she needs to handle those things for you?”

You are not trying to manufacture a problem. You are trying to understand what would actually happen.

Phase 1 | Understand the Family

The first pages are about people, not documents. Learn what brought them to the workshop, what they heard that concerned them, who matters most to them, and what they do not want their family to experience.

WHO ARE WE PROTECTING, AND WHAT ARE WE PROTECTING THEM FROM?

Listen For

- The people they are most concerned about.
- A past family experience with probate, incapacity, conflict, or poor planning.
- Fear of leaving children with confusion or unnecessary work.
- Concerns involving a home, business, minor children, blended family, or vulnerable beneficiary.
- A person they trust to step in if they cannot act for themselves.
- Anything they say more than once. Repetition often tells you what matters most.

Do Not Rush This Section

Something the family tells you here may become the most important part of the entire meeting. Later, when you summarize the Review, use their priorities and their language. Do not replace their concerns with your own.

“You told me the three things that matter most are keeping the house in the family, making things easy for your children, and making sure your daughter can help if you cannot. Let's keep those three things in front of us as we go through the rest of the Review.”

Phase 2 | Discover What Would Happen Today

Now move into existing documents, assets, beneficiaries, decision-makers, and trust funding. Your role is to ask, listen, and document.

What You Need to Discover

The packet identifies facts you need to record. Do not turn those fields into a rapid-fire interview. Let the family tell you what they have done, listen for what is clear or uncertain, and then clarify what you still need to understand.

OPEN → LISTEN → CLARIFY → EXPLORE → DOCUMENT

- Start broadly when appropriate: “Tell me a little about what you’ve already done with your estate planning.”
- If they say, “We did a trust about eight years ago,” you might follow with: “What have you done with it since then?” Their answer may naturally lead to review, funding, titling, beneficiaries, or other areas that need clarification.
- Use “What if?” or “Imagine this...” when a realistic scenario will help the family consider what would actually happen. The purpose is discovery, not drama or pressure.
- Required citizenship screen: “Is either spouse or partner not currently a United States citizen?”
- If the answer is Yes or Unsure, identify the need for attorney and tax review. Do not explain, recommend, or decide whether a Qualified Domestic Trust or another specialized strategy is required.
- Be sure you discover and record what the family knows or does not know about:
 - Existing trust or other planning documents, when they were last reviewed, and whether trust funding is clear.
 - Home title, major beneficiary designations, and who can legally handle financial and healthcare decisions if needed.
 - Whether the family knows where important documents are, what significant assets exist, and what they would need to do.

“IF YOU PASSED AWAY TONIGHT, DO YOU KNOW EXACTLY WHO RECEIVES THIS ASSET AND HOW THEY RECEIVE IT?”

“I don't know” is not a bad answer. It is a discovery.

Stay in Your Lane

Do not practice law or criticize another attorney's work. Do not declare an existing plan invalid. Do not give legal, tax, insurance, or investment advice. If an issue requires professional interpretation, identify it as an area that needs review and refer the family to the appropriate qualified professional.

IDENTIFY THE GAP. DO NOT PRACTICE LAW.

Phase 3 | Let the Family See the Gaps

The Family Protection Checkup is the centerpiece of the Review. Complete it honestly from the conversation.

Use the Three Categories

CATEGORY	WHAT IT MEANS
PROTECTED	The family appears to have this area addressed based on the information provided.
NEEDS REVIEW	Something exists, but there is uncertainty, an update may be needed, or additional review is appropriate.
NOT ADDRESSED	The family has identified that this area is not currently handled.

Turn the Page Toward the Family

Do not complete the checkup and keep it facing you. Turn it toward the family and walk through it together.

“When we started today, you weren’t completely sure where everything stood. Now we have a much clearer picture.”

Then pause. Let them look at it.

CREDIBILITY MATTERS MORE THAN CREATING URGENCY.

If seven areas need attention, show seven. If only two need attention, say two. Never exaggerate a problem to create urgency.

When to Discuss Claim My Legacy™

ONLY AFTER THE REVIEW IS COMPLETE.

Do not begin discussing the \$1,995 package early because you think you already know what the family needs. Earn the right to make a recommendation by completing the Review first.

Summarize Before You Recommend

“You told me your biggest concerns were keeping the house in the family, making things easy for your children, and making sure your daughter could handle things if you couldn't.”

“Based on what we've gone through today, there are several areas that deserve some attention.”

Now connect the family's stated priorities to the planning gaps you identified. This is the bridge to the Claim My Legacy Value Stack™.

The Sequence

- Start with what the family told you matters.
- Review what appears protected.
- Review what needs attention.
- Confirm that your understanding is accurate.
- Only then explain how Claim My Legacy may help.

DISCOVERY FIRST. RECOMMENDATION SECOND.

How to Use the Claim My Legacy Value Stack™

Do not introduce the Value Stack by saying, “Here's everything you get for \$1,995.”

Instead say: “Let me show you how we help families address the things we just identified.”

DOCUMENTS

Explain the estate planning documents applicable to the family's situation. Do not overwhelm them with document names. Explain what the documents are intended to accomplish.

FUNDING

Explain that creating a trust and connecting appropriate assets to the plan are different steps. Claim My Legacy provides trust-funding guidance while legal, tax, insurance, and financial decisions remain with the appropriate professionals.

ORGANIZATION

Show the Legacy Binder™. Help them picture the day a child, successor trustee, or other trusted person may need to find and understand the family's plan.

FAMILY

Bring the conversation back to where it started. The purpose is not the trust. The purpose is the people the plan is designed to protect.

DOCUMENTS + FUNDING + ORGANIZATION + FAMILY

How to Discuss the Investment

After the family understands what was discovered and how Claim My Legacy can help, show the investment.

LOCAL ATTORNEY ESTATE PLANNING	CLAIM MY LEGACY™ COMPLETE PACKAGE
\$4,500+*	\$1,995

*Estate planning fees vary by attorney or provider, plan complexity, family circumstances, and services included. \$4,500+ reflects local pricing observed by Claim My Legacy and is not intended to represent the fees charged by every attorney.

Do

- State the \$1,995 investment clearly and confidently.
- Connect the package to the areas identified during the Review.
- Give the family a moment to absorb the information.
- Answer the question they actually ask.

Do Not

- Apologize for the price.
- Say “It's only \$1,995.”
- Immediately offer a discount.
- Turn the meeting into a price comparison.
- Keep talking because silence feels uncomfortable.

“Our complete estate planning package is \$1,995. More importantly, it is designed to address the areas we identified together today.”

Then stop talking.

The Closing Question

You do not need a complicated close. You already did the work.

**“BASED ON EVERYTHING WE'VE DISCOVERED TODAY,
WOULD YOU LIKE US TO HELP YOU GET THIS TAKEN CARE OF?”**

Then listen.

If They Are Ready

Help them move into the next step of the Claim My Legacy process.

If They Have a Question

Answer it clearly. If you do not know, say so and get the correct answer rather than guessing.

If They Have a Concern

Understand the concern before responding. Do not assume every hesitation is about price.

If They Need Someone Else Involved

If they want to speak with a child, spouse, financial advisor, CPA, attorney, or another trusted person, determine the appropriate next step and schedule the follow-up when appropriate.

**THE OBJECTIVE IS NOT PRESSURE.
THE OBJECTIVE IS CLARITY.**

The family should leave knowing what they have, what appears protected, what may need attention, why it matters, what Claim My Legacy can do to help, what it costs, and what happens next.

The Claim My Legacy Rule

NEVER USE FEAR TO CREATE A PROBLEM.

USE QUESTIONS TO UNCOVER THE PROBLEM THAT ALREADY EXISTS.

THEN HELP THE FAMILY DECIDE WHAT THEY WANT TO DO ABOUT IT.

Before Every Family Legacy Review™

- Know the Family Legacy Review™ packet well enough that you do not have to read it to the family.
- Have the Value Stack™ available.
- Have a working pen and a clean copy of the packet.
- Know the next step if the family decides to move forward.
- Enter the meeting curious, not convinced.

After Every Family Legacy Review™

- Record the agreed next action.
- Schedule any promised follow-up.
- Protect the family's information and handle completed Review materials appropriately.
- Do not make promises outside the Claim My Legacy process or your role.
- Ask yourself: Did the family leave with more clarity than when they arrived?

Training teaches. Practice develops. Certification proves readiness.

CLAIM MY LEGACY™

We do more than just documents.

We protect the people you love most.