CLAIM MY LEGACY™

THE CLAIM MY LEGACY ACADEMY™

LEGACY SPECIALIST WORKBOOK

CML-ACA-101 • V1.3

Training teaches. Practice develops.
Certification proves readiness.

Candidate Name: _____

Start Date: _____ Trainer: _____

How to Use This Workbook

This workbook is your working companion through The Claim My Legacy Academy™. It is intentionally shorter than the master curriculum. Use it to capture what you are learning, practice the skills, prepare for role-play, and document your progress toward certification.

YOUR JOB IS NOT TO MEMORIZE EVERY WORD
Learn the framework. Practice the behavior. Sound like yourself while protecting the Claim My Legacy standard.

Certification Path

Candidate

↓

Foundation Qualified

↓

Conversation Qualified

↓

Family Legacy Review™ Qualified

↓

Client Experience Qualified

↓

Certified Claim My Legacy Legacy Specialist™

NON-NEGOTIABLE STANDARD
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.

Five Rules to Carry Through Every Stage

- Understand before recommending.
- Never guess when the answer matters.
- Stay inside your professional role.
- Do what you say you will do.

- No family gets lost.

STAGE 1

FOUNDATION QUALIFICATION

Understand Claim My Legacy before you represent Claim My Legacy.

Stage 1: Foundation Qualification

MODULE 1

The Claim My Legacy Story & Mission

MODULE OBJECTIVE
Explain what Claim My Legacy actually does for families and why our work goes beyond documents.

What You Need to Know

- Think in four dimensions: Documents + Funding + Organization + Family.
- A Legacy Specialist is an educator, guide and facilitator, not a pressure-based salesperson.
- Family-first means the right outcome may be yes, not yet, professional review, or no.
- "I don't know, but I will help get the right answer" is better than guessing.

Framework to Remember

DOCUMENTS + FUNDING + ORGANIZATION + FAMILY
Use this as the core value lens for everything that follows.

Practice

In 60 seconds, how would you explain what Claim My Legacy does?

_____

_____

What makes our approach different from simply delivering estate-planning documents?

_____

_____

Candidate Reflection

Which part of the Claim My Legacy mission feels easiest for you to explain? Which part needs practice?

_____

_____

Ready to Demonstrate

☐ I can explain Claim My Legacy without reading a script.

☐ I understand the family-first standard.

☐ I can state the no-fear rule in my own words.

Stage 1: Foundation Qualification

MODULE 2

The Claim My Legacy Family Journey

MODULE OBJECTIVE
Understand the full family journey so you always know where a family is and what appropriate next step may follow.

What You Need to Know

- The family journey is EDUCATE → DISCOVER → PLAN → ORGANIZE → FUND → REVIEW.
- The Family Legacy Review™ belongs in DISCOVER.
- The Family Operating System™ supports ORGANIZE.
- Trust Funding Assistance supports FUND.
- Annual review keeps the relationship connected to real-life changes.

Framework to Remember

EDUCATE → DISCOVER → PLAN → ORGANIZE → FUND → REVIEW
The journey is a circle. Life changes may cause a family to re-enter an earlier stage.

Practice

A family attended a workshop and is unsure what planning they already have. Where are they in the journey?

A client bought a new property after completing their plan. What is the likely next step?

Candidate Reflection

Where in the journey do you expect to have the greatest responsibility?

Ready to Demonstrate

☐ I can explain all six stages.

☐ I can identify the next step from a family scenario.

☐ I know when another professional may need to become involved.

Stage 1: Foundation Qualification

MODULE 3

Estate Planning Fundamentals

MODULE OBJECTIVE
Explain core estate-planning concepts accurately in plain English while recognizing when a question requires professional review.

What You Need to Know

- Estate planning addresses both life/incapacity and death.
- Know the general purpose of a Will, Revocable Living Trust, Powers of Attorney, healthcare directives, HIPAA Authorization, Certificate of Trust and Pour-Over Will.
- Understand Trustee, Successor Trustee, Beneficiary and basic probate concepts.
- Ownership and beneficiary arrangements matter.
- Trust funding is not “put everything in the trust.”

Framework to Remember

UNDERSTAND → EXPLAIN → RECOGNIZE → REFER
Know the concept. Explain the concept. Recognize the boundary. Refer when individualized analysis is required.

Practice

Explain probate in no more than 45 seconds.

_____

_____

Explain the difference between a Healthcare POA and a Living Will.

_____

_____

A client asks whether their IRA should name the trust. What do you do?

Candidate Reflection

Which estate-planning concept do you tend to over-explain?

Ready to Demonstrate

☐ I can explain core concepts without jargon.

☐ I can distinguish general education from individualized advice.

☐ I will refer rather than guess.

Stage 1: Foundation Qualification

MODULE 4

The Claim My Legacy Estate Plan

MODULE OBJECTIVE
Know what the family receives for the standard $1,995 investment and explain value without turning the conversation into a document list.

What You Need to Know

- Know the core estate-planning document package.
- Certificate of Trust is included.
- The Family Operating System™ and trust-funding guidance are part of the integrated experience.
- State the $1,995 investment clearly and without apology.
- Use attorney-cost comparisons only with approved qualified language.
- Never make guarantees about probate, taxes, asset protection or outcomes.

Framework to Remember

VALUE BEFORE PRICE
Help the family understand what they are evaluating before stating the investment. Then state $1,995 and stop.

Practice

How would you answer: "What do we get for $1,995?"

_____

_____

How would you respond if someone calls the plan "just paperwork"?

_____

_____

Candidate Reflection

How comfortable are you stating the $1,995 investment? What would make you more comfortable?

_____

_____

Ready to Demonstrate

☐ I know the core plan components.

☐ I can explain the four-part value framework.

☐ I can state $1,995 confidently and stop talking.

Stage 1: Foundation Qualification

MODULE 5

Role, Ethics & Professional Boundaries

MODULE OBJECTIVE
Demonstrate judgment that protects the family, Claim My Legacy and the integrity of the Legacy Specialist role.

What You Need to Know

- Never manufacture fear or urgency.
- Tell the truth even when it costs a transaction.
- Compensation never changes the recommendation.
- Protect confidential information and collect only what is needed.
- Recognize possible coercion or capacity concerns without diagnosing.
- Report, document and correct mistakes rather than hiding them.
- Build relationships, not territories. Claim My Legacy does not provide protected territories or exclusive locations.
- Respect specifically created opportunities. Working in the same market does not entitle you to another Specialist's leads, workshop, marketing investment or specifically created business opportunity.
- When your paths cross with another Legacy Specialist, protect the client experience and conduct yourself professionally.
- Opportunity follows readiness. Larger or collaborative opportunities may require demonstrated experience, follow-through and capacity to serve families well.

Framework to Remember

THE DECISION TEST
Is it true? Is it within my role? Is it good for the family? Would I be comfortable if the conversation were reviewed?

Practice

A client asks you to interpret a paragraph in an existing trust. What do you say?

You realize yesterday's explanation was incorrect. What do you do?

A family wants a week to think. You need one more client this month. What do you do?

You created and funded a specific workshop. Another Specialist works in the same area. What does no protected territory mean, and what does it not mean?

Another Specialist is already active at a community you want to serve. How do you proceed without claiming or surrendering territory?

Candidate Reflection

What situation would make it hardest for you to maintain a professional boundary?

Ready to Demonstrate

☐ I can recognize when to stop and escalate.

☐ I will not use compensation as a reason to push.

☐ I understand that family information is confidential.

☐ I can distinguish open geography from another Specialist's specifically created opportunity.

Stage 1: Foundation Qualification

MODULE 6

Foundation Qualification Assessment Prep

MODULE OBJECTIVE
Prepare to demonstrate knowledge, plain-English explanation, answer-or-refer judgment and understanding of the Claim My Legacy mission.

What You Need to Know

- Assessment includes foundation knowledge, estate-planning fundamentals, explain-it-simply exercises, answer-or-refer scenarios, journey/judgment scenarios and the 60-second Claim My Legacy demonstration.
- Passing requires 85% overall and no critical ethical or boundary failure.
- Development Required is a training outcome, not a punishment.

Framework to Remember

PASSING IS NOT JUST A SCORE
A serious professional-boundary or ethics failure can override a high numerical score.

Practice

Write your 60-second "What does Claim My Legacy do?" explanation.

_____

_____

Candidate Reflection

What are the three areas you most want to practice before the Foundation assessment?

_____

_____

Ready to Demonstrate

☐ I can explain the mission.

☐ I can explain core estate concepts.

☐ I can answer or refer appropriately.

☐ I am ready for verbal demonstration.

Stage 1 Qualification Preparation

Foundation Qualification

QUALIFICATION STANDARD
Qualification is earned by demonstrated readiness, not attendance alone.

Before You Test

☐ I can explain Claim My Legacy naturally in approximately 60 seconds.

☐ I can explain the six-stage family journey.

☐ I can explain core estate-planning concepts in plain English.

☐ I can explain the $1,995 estate plan and four-part value framework.

☐ I consistently recognize professional boundaries.

My Development Notes

Trainer Feedback

Assessment Date	
Score / Result	
Development Required	
Reassessment Date	

STAGE 2

CONVERSATION QUALIFICATION

Can you sit across from a family and make them feel heard rather than handled?

Stage 2: Conversation Qualification

MODULE 1

The Claim My Legacy Conversation

MODULE OBJECTIVE
Use a natural conversation framework that begins with understanding rather than presentation.

What You Need to Know

- Begin by asking permission to have the conversation. Once permission is given, move forward naturally.
- A conversation begins with the family, not your talking points.
- Rapport is the result of genuine attention, not a technique.
- Discovery comes before solution.
- Include both spouses or decision participants.
- Emotion is not an objection.
- During discovery, the family should generally be doing most of the talking.

Framework to Remember

ASK PERMISSION → OPEN → LISTEN → CLARIFY → EXPLORE → DOCUMENT
The next good question usually comes from the last answer.

Practice

A client says, "We already have a Will." Respond with a question, not a solution.

_____

_____

A client says, "My daughter handles everything." Respond with a question.

_____

_____

Candidate Reflection

What habit could make you solve too early?

_____

_____

Ready to Demonstrate

☐ I can ask permission and open the conversation naturally.

☐ I can listen without immediately solving.

☐ I can summarize what I heard accurately.

Stage 2: Conversation Qualification

MODULE 2

Asking Better Questions

MODULE OBJECTIVE
Ask questions that uncover the family's people, planning, property, concerns and desired outcome without manipulating them toward a predetermined answer.

What You Need to Know

- Use open questions to explore and closed questions to confirm.
- The second question is often more valuable than the first.
- Use "Tell me more," "What do you mean?" and "Help me understand."
- Ask one question at a time.
- Do not put the answer inside the question.
- Permission is not reserved only for sensitive topics. It is how we open discovery respectfully: "Would it be okay if I asked you a couple of questions?" Once the family says yes, move on.

Framework to Remember

PEOPLE → PLANNING → PROPERTY → CONCERNS → OUTCOME
Also think PAST → PRESENT → FUTURE and ASK → LISTEN → FOLLOW.

Practice

Rewrite this leading question: "You don't want your children stuck in probate, do you?"

_____

_____

What follow-up would you ask after: "We already have a trust"?

_____

Candidate Reflection

Which discovery area do you tend to skip or rush?

Ready to Demonstrate

☐ I can use open and closed questions appropriately.

☐ I can ask meaningful second questions.

☐ I avoid manipulative leading questions.

Stage 2: Conversation Qualification

MODULE 3

Listening & Finding the Real Issue

MODULE OBJECTIVE
Hear the difference between the words a family says, the uncertainty underneath them and the outcome they actually want.

What You Need to Know

- Listen for facts, uncertainty, change, emotion/values and outcome.
- Words like “I think,” “probably,” and “I assume” signal uncertainty.
- Reflect before redirecting.
- Clarify what words like “simple,” “ready,” or “expensive” actually mean to that family.
- Never use personal information shared in discovery as emotional leverage later.

Framework to Remember

FACTS → UNCERTAINTY → CHANGE → EMOTION/VALUES → OUTCOME
Then REFLECT → CLARIFY → CONFIRM.

Practice

A client says, “I don’t want probate.” What do you want to understand next?

A client says, "I need to talk to my daughter." What might that mean?

Candidate Reflection

What signals tell you that you are truly listening rather than waiting to talk?

Ready to Demonstrate

☐ I can recognize uncertainty.

☐ I can identify meaningful change.

☐ I can summarize the family's desired outcome.

☐ I will never weaponize emotional information.

Stage 2: Conversation Qualification

MODULE 4

Explaining Without Lecturing

MODULE OBJECTIVE
Explain important concepts accurately and briefly so families understand rather than feel overwhelmed.

What You Need to Know

- Answer the question asked.
- Use plain English and one idea at a time.
- Start with a short explanation and expand only when needed.
- Check understanding, then stop.
- Use examples to simplify, not impress.
- Watch the family for cues that you are going too fast or saying too much.

Framework to Remember

ANSWER → CHECK → STOP
Give the simplest accurate answer, check understanding, expand only if needed, recognize the boundary, then stop.

Practice

Explain a Revocable Living Trust in 45 seconds.

Explain the Family Operating System™ in 45 seconds.

Explain the $1,995 investment without immediately defending it.

Candidate Reflection

What subject makes you most likely to lecture?

Ready to Demonstrate

☐ I can explain core concepts in 30–60 seconds.
☐ I can change my explanation if the family remains confused.
☐ I can stop when the question is answered.

Stage 2: Conversation Qualification

MODULE 5

Concerns, Value & Decision Conversations

MODULE OBJECTIVE
Understand what is behind a family's hesitation and respond without arguing, discounting or

pressuring.

What You Need to Know

- A concern is information, not an obstacle to defeat.
- Price may mean affordability, value, timing or comparison. Clarify first.
- Respect spouse, daughter, attorney and other advisors.
- Existing Wills and Trusts are discovery facts, not objections.
- State $1,995 calmly.
- No artificial urgency, guilt or closing tricks.

Framework to Remember

UNDERSTAND THE CONCERN → EXPLORE & RESOLVE → DECIDE
Use the detailed Claim My Legacy concern process: understand before responding, explore what is really behind the concern, then help the family reach and communicate a decision without pressure.

Practice

Client: "$1,995 is more than I expected." What is your first response?

_____

_____

Client: "I need to talk to my daughter." What do you want to understand?

_____

_____

Client: "I found a trust online for a few hundred dollars." How do you respond without attacking the provider?

_____

_____

Candidate Reflection

Which concern would make you most defensive? How will you manage that reaction?

_____

_____

Ready to Demonstrate

☐ I clarify before responding.

☐ I can discuss value without attacking competitors.

☐ I can ask for a decision without pressure.

Stage 2: Conversation Qualification

MODULE 6

Asking for the Decision & Following Up

MODULE OBJECTIVE
Bring the conversation to a clear next step without forcing a yes or leaving the family wondering what happens next.

What You Need to Know

- Summarize before recommending.
- Confirm you understood correctly.
- Recommend the next step based on discovery.
- Ask clearly, then be quiet.
- YES means delivery begins.
- NOT YET needs a meaningful next step when appropriate.
- REFER protects the family.
- NO must be respected.

Framework to Remember

SUMMARIZE → CONFIRM → RECOMMEND → ASK → RESPOND → FOLLOW THROUGH
Every conversation should ultimately have a clear state: YES, NOT YET, REFER or NO.

Practice

Write the decision question that sounds most natural in your own voice.

How will you handle ten seconds of silence after asking?

Write a purposeful follow-up opening for a client who wanted to speak with their daughter first.

Candidate Reflection

Do you tend to avoid asking, or ask too aggressively? What is the correction?

Ready to Demonstrate

☐ I can ask directly.

☐ I can remain quiet after asking.

☐ I can respect no.

☐ I can create a purposeful follow-up.

Stage 2 Qualification Preparation

Conversation Qualification

QUALIFICATION STANDARD
Qualification is earned by demonstrated readiness, not attendance alone.

Before You Test

☐ I can conduct discovery without pitching.

☐ I ask second questions and follow the family's answers.

☐ I listen for facts, uncertainty, change, values and outcome.

☐ I explain concepts briefly and clearly.

☐ I can handle price, daughter/spouse, existing-plan and comparison concerns without arguing.

☐ I can ask for a decision and respect the answer.

My Development Notes

Trainer Feedback

Assessment Date

Score / Result

Development Required

Reassessment Date

STAGE 3

FAMILY LEGACY REVIEW™ QUALIFICATION

Use the real Family Legacy Review™ system accurately, naturally and without manufacturing gaps.

Stage 3: Family Legacy Review™ Qualification

MODULE 1

Purpose & Structure of the Family Legacy Review™

MODULE OBJECTIVE
Understand what the Family Legacy Review™ is, what it is not and how the eight-stage process guides the meeting.

What You Need to Know

- The FLR helps a family understand what they have, what changed, what may be uncertain, what matters and what next step may be appropriate.
- The packet is a guide and record, not a script.
- The Review is not a legal consultation or a disguised high-pressure sales appointment.
- Use the approved CML-FLR tools rather than Academy-created duplicates.

Framework to Remember

UNDERSTAND → DISCOVER → SEE THE GAPS → SUMMARIZE → SHOW THE VALUE → INVESTMENT → ASK → FOLLOW UP
Value follows understanding and discovery.

Practice

Write one sentence describing the purpose of each of the eight stages.

_____

_____

Candidate Reflection

What would make an FLR feel like a sales pitch instead of a review?

_____

_____

Ready to Demonstrate

☐ I know the eight-stage process.

☐ I understand how to use the FLR packet naturally.

☐ I understand the purpose of the FLR.

Stage 3: Family Legacy Review™ Qualification

MODULE 2

UNDERSTAND & DISCOVER

MODULE OBJECTIVE
Use structured discovery to understand the family without turning the packet into an interrogation.

What You Need to Know

- Start with why the family is here and what would make the meeting useful.
- Explore people, planning, property, authority, implementation, organization, change and priorities.
- Unknown is a valid answer.
- Facts and assumptions must remain separate.
- Do not promise a solution during discovery.
- Pause or escalate when coercion, capacity or professional-boundary concerns appear.

Framework to Remember

PEOPLE → PLANNING → PROPERTY → AUTHORITY → IMPLEMENTATION → ORGANIZATION → CHANGE → PRIORITIES
VERIFY WHAT YOU KNOW. MARK WHAT YOU DON'T.

Practice

A widow says, "My husband handled all of it. I think the house is in the trust." List what is confirmed and what is unknown.

_____

_____

What question helps discover the family's priority after you have gathered facts?

_____

_____

Candidate Reflection

Which of the eight discovery areas will require the most practice for you?

_____

_____

Ready to Demonstrate

☐ I can separate facts from assumptions.

☐ I can use the packet without becoming mechanical.

☐ I can identify what matters most to the family.

Stage 3: Family Legacy Review™ Qualification

MODULE 3

SEE THE GAPS & SUMMARIZE

MODULE OBJECTIVE
Classify findings accurately and summarize without exaggerating, diagnosing or manufacturing a problem.

What You Need to Know

- Unknown does not mean wrong.
- Old does not automatically mean bad.
- Different does not automatically mean incorrect.
- Start with what is working.
- A Review can legitimately identify no significant gap.
- Document findings factually.

Framework to Remember

CONFIRMED → UNKNOWN → NEEDS REVIEW → POTENTIAL GAP → OUTSIDE OUR ROLE
Then SUMMARIZE WITHOUT EXAGGERATING.

Practice

Classify: "I think the house is in the trust."

Classify: "Our daughter is named, but we no longer want her serving."

Classify: "Should our trust own our LLC?"

Candidate Reflection

Could you tell a family that no significant gap was found even if it meant no transaction? Why?

Ready to Demonstrate

☐ I can use all five classifications.

☐ I acknowledge what is already working.

☐ I can summarize and ask the family to correct me.

Stage 3: Family Legacy Review™ Qualification

MODULE 4

SHOW THE VALUE & INVESTMENT

MODULE OBJECTIVE
Connect the family's confirmed priorities to the Claim My Legacy value framework, then state the investment clearly.

What You Need to Know

- Earn the right to present value through discovery.
- Lead with the part of Documents + Funding + Organization + Family that matters most to this family.
- Do not inflate value with invented retail math.
- Do not call core components "bonuses."
- State $1,995 and stop.
- Use comparisons only with approved qualified language.

Framework to Remember

CONFIRM SUMMARY → CONNECT PRIORITIES → SHOW VALUE → EXPLAIN RELEVANT COMPONENTS → STATE $1,995 → STOP
Value before price does not mean an endless feature dump.

Practice

Write a 90-second value explanation for a family whose biggest concern is that their children would not know where to begin.

How would you respond if another provider is cheaper?

Candidate Reflection

Which of the four value dimensions do you naturally emphasize most? Which might you overlook?

Ready to Demonstrate

☐ I tie value to discovery.

☐ I can state $1,995 comfortably.

☐ I do not use probate fear or family love as price leverage.

Stage 3: Family Legacy Review™ Qualification

MODULE 5

ASK & FOLLOW UP

MODULE OBJECTIVE
Complete the Family Legacy Review™ with a direct ask, a respected answer and a clear documented next step.

What You Need to Know

- A respectful direct question is not pressure. Refusing to respect the answer is pressure.

- YES → proceed and explain next steps.
- NOT YET → clarify and define a meaningful next step if appropriate.
- REFER → identify the exact professional question.
- NO → respect and close.
- Use CML-FLR-105 for the approved follow-up process.

Framework to Remember

ASK → YES / NOT YET / REFER / NO → DOCUMENT THE OUTCOME
No family should leave a Family Legacy Review™ wondering who is supposed to do what next.

Practice

Write your natural FLR decision question.

_____

_____

Write a factual note for: client wants daughter involved before deciding.

_____

_____

Candidate Reflection

Which outcome is hardest for you to handle: not yet, refer or no? Why?

_____

_____

Ready to Demonstrate

☐ I can ask and stay quiet.
☐ I can stop selling after yes.
☐ I can refer even if it delays the transaction.
☐ My notes are factual.

Stage 3 Qualification Preparation

Family Legacy Review™ Qualification

QUALIFICATION STANDARD
Qualification is earned by demonstrated readiness, not attendance alone.

Before You Test

☐ I can conduct the eight-stage FLR using the approved materials.

☐ I can distinguish confirmed, unknown, needs review, potential gap and outside our role.

☐ I can identify no significant gap without manufacturing one.

☐ I can connect value to the family's priorities and state $1,995.

☐ I can handle unexpected moments and document the outcome.

My Development Notes

Trainer Feedback

Assessment Date	
Score / Result	
Development Required	
Reassessment Date	

STAGE 4

CLIENT EXPERIENCE QUALIFICATION

After YES, can you deliver the Claim My Legacy experience all the way to verified completion?

Stage 4: Client Experience Qualification

MODULE 1

The Claim My Legacy Client Experience

MODULE OBJECTIVE
Own the family's experience after YES so every active family has a known status, next action, owner and communication point.

What You Need to Know

- YES means delivery begins.
- Documents + Funding + Organization + Family becomes the delivery framework.
- A warm handoff prevents families from restarting their story.
- The Client Journey is the operational source of truth.
- Waiting is a status, not an excuse.
- Signed documents are a milestone, not automatically completion.

Framework to Remember

NO FAMILY GETS LOST
Every active family has a current status, a next action, an owner and an appropriate next communication point.

Practice

For an active family, answer: Where are we? What happens next? Who is responsible?

_____

_____

What makes a handoff feel warm instead of like being passed around?

_____

_____

Candidate Reflection

Where could a family most easily get lost in a process you have experienced before?

_____

_____

Ready to Demonstrate

☐ I understand YES = delivery begins.

☐ I can identify status, next action and owner.

☐ I understand signed ≠ completed.

Stage 4: Client Experience Qualification

MODULE 2

Intake, Expectations & Communication

MODULE OBJECTIVE
Start the client relationship with clear expectations, accurate information, appropriate privacy and proactive communication.

What You Need to Know

- Explain why, what, how, who and what happens next before collecting information.
- Collect only what the approved process requires.
- Separate information from decisions.
- Clarify ambiguous instructions.
- Confirm receipt of important information.
- Translate internal status language into clear family language.
- Communicate delays before the family has to chase us.

Framework to Remember

EXPLAIN → COLLECT → CLARIFY → VERIFY → PROTECT → DOCUMENT → COMMUNICATE → MOVE
Accuracy beats speed.

Practice

A client says, "Just put my oldest boy as backup." What do you clarify?

Write a client update when documents are still processing and nothing is needed from the family.

Candidate Reflection

What communication promise are you most likely to make casually and then miss?

Ready to Demonstrate

☐ I do not guess at intake.

☐ I protect sensitive information.

☐ I communicate clearly even when nothing has changed.

Stage 4: Client Experience Qualification

MODULE 3

The Document Journey

MODULE OBJECTIVE
Guide families through preparation, review, signing and correction while staying inside the Legacy Specialist role.

What You Need to Know

- Do not send uncertainty downstream.
- Documents Ready for Client Review does not mean Ready to Sign.
- Distinguish factual confirmation/general education from document-specific legal interpretation.
- Capture and route substantive questions.
- Use disciplined version control.
- Never encourage blind signing.
- Stop and escalate voluntariness/capacity concerns.
- Signing is not completion.

Framework to Remember

PREPARE → PROCESS → REVIEW → QUESTION → REVISE → VERIFY → SIGN → ORGANIZE → IMPLEMENT

DON'T GUESS.

Practice

A family asks what a specific paragraph means if their son divorces. What do you do?

_____

_____

You discover the signing packet is an earlier draft. What is the correct action?

_____

_____

Candidate Reflection

Which document-stage pressure could tempt someone to take a shortcut?

_____

_____

Ready to Demonstrate

☐ I can distinguish education from legal interpretation.

☐ I can stop a signing when something is not right.

☐ I understand version control and error ownership.

Stage 4: Client Experience Qualification

MODULE 4

Delivering the Family Operating System™

MODULE OBJECTIVE
Help the family activate the Family Operating System™ as a usable system rather than overwhelm them with a binder full of pages.

What You Need to Know

- Orient, prioritize, complete progressively and continue.
- The system should help answer who to call, where the documents are, what to know and what to do next.

- Protect passwords and other sensitive credentials.
- Family awareness does not require full financial disclosure.
- The system is successful when it is usable, not merely filled out.
- Connect the Family Operating System™ to funding and future review.

Framework to Remember

ORIENT → PRIORITIZE → ORGANIZE → PROTECT → IMPLEMENT → COMMUNICATE → MAINTAIN
DON'T OVERWHELM THE FAMILY.

Practice

Give a two-minute introduction to the Family Operating System™ without listing every tab.

_____

_____

A client says, "There's no way I'm filling all this out." How do you respond?

_____

_____

Candidate Reflection

How would you help a family start with the minimum usable system?

_____

_____

Ready to Demonstrate

☐ I can explain the system, not merely the binder.
☐ I can prioritize without overwhelming.
☐ I protect family disclosure choices and sensitive information.

Stage 4: Client Experience Qualification

MODULE 5

Trust Funding & Implementation

MODULE OBJECTIVE
Guide implementation asset by asset while following the estate plan, institution requirements and appropriate professional guidance.

What You Need to Know

- Not every asset is handled the same way.
- Funding is a process, not a conversation.
- Use Standard Implementation / Needs Clarification / Professional Review Required.
- Institution requirements vary.
- Retirement, beneficiary, insurance, annuity, investment and business issues may require professional review.
- Submission is not completion. Verification is required, and COMPLETE records that the verified funding step has been finished.

Framework to Remember

DISCOVER → REVIEW → REQUEST → SUBMIT → VERIFY → COMPLETE
REQUESTED IS NOT COMPLETED. SUBMITTED IS NOT COMPLETED. VERIFY the result, then COMPLETE the process and record the outcome.

Practice

A client says, "Just put everything into the trust." How do you respond?

_____

_____

A client says, "I mailed the bank form, so that is done." What do you say?

_____

_____

An IRA beneficiary question arises. What path applies?

_____

_____

Candidate Reflection

Which asset category makes you most likely to overstep?

_____

_____

Ready to Demonstrate

☐ I review assets individually.

☐ I recognize professional-review categories.

☐ I require verification before marking an item complete.

Stage 4: Client Experience Qualification

MODULE 6

Completion, Problems & Lifetime Relationship

MODULE OBJECTIVE
Define completion accurately, recover from problems with integrity and keep the family connected when life changes.

What You Need to Know

- Complete means we know what has been finished and what remains.
- Use the final client review before closing current scope.
- Own problems rather than defend or blame.
- Escalate serious privacy, legal, execution, coercion or professional-conduct concerns early.
- Referrals and reviews come after value has been delivered.
- Annual review is service, not a sales appointment.
- Life change triggers review, not an automatic document rewrite.

Framework to Remember

RECOGNIZE → OWN → CLARIFY → CORRECT → COMMUNICATE → DOCUMENT → LEARN
For long-term planning: CHANGE → REVIEW.

Practice

Write a response to: “Nobody has called me in two weeks. I regret doing this.”

What does “Completed” mean in Claim My Legacy?

A family bought a condo and their daughter moved. What should happen next?

Candidate Reflection

How do you personally react when someone is angry with you? What will help you stay effective?

Ready to Demonstrate

☐ I can define completion accurately.

☐ I own Claim My Legacy mistakes.

☐ I understand Change → Review.

☐ I maintain professional boundaries in long-term relationships.

Stage 4: Client Experience Qualification

MODULE 7

Claim My Legacy Platform Practicum

What You Need to Know

- Platform competency must be demonstrated, not assumed.
- The platform never gives you permission to guess.
- Use REVIEW → ENTER → VERIFY → GENERATE → QUALITY CHECK → CORRECT → REGENERATE → FINAL VERIFY → MOVE FORWARD.
- Transfer approved information. Do not interpret or invent client intent.
- Generated does not mean correct. Compare output against approved client information.
- Protect credentials, client information, authorization, and version control.
- When information is missing, contradictory, confusing, or outside your role: STOP → CLARIFY → VERIFY → PROCEED.

Framework to Remember

THE PLATFORM RULE™
THE PLATFORM NEVER GIVES YOU PERMISSION TO GUESS.

STOP → CLARIFY → VERIFY → PROCEED

Practice

The intake says Robert Allen Matthews in one place and Robert Alan Matthews in another. What do you do?

_____

_____

The platform requires a field that is not answered in the approved intake. What do you do?

_____

_____

A generated document appears inconsistent with the approved information even though the platform entry looks correct. What happens next?

_____

_____

Robert asks whether his trust should be beneficiary of his IRA. How do you respond?

_____

_____

You regenerate documents after an approved change. How do you make sure the old version is not used?

_____

_____

Candidate Reflection

Where are you personally most likely to move too fast or guess while using a platform?

_____

_____

Ready to Demonstrate

☐ I can accurately create and enter a practice family.

☐ I stop when required information is unclear or missing.

☐ I can generate and quality-check the document package.

☐ I can process corrections and control the current version.

☐ I protect privacy, authorization and platform credentials.

☐ I can move the family to the correct Client Journey stage.

Stage 4 Qualification Preparation

Client Experience Qualification

QUALIFICATION STANDARD
Qualification is earned by demonstrated readiness, not attendance alone.

Before You Test

☐ I can guide a family from YES through the Client Journey.

☐ I can manage intake, expectations and proactive communication.

☐ I can facilitate the document journey without practicing law.

☐ I can activate the Family Operating System™.

☐ I can guide Trust Funding using Discover → Review → Request → Submit → Verify → Complete.

☐ I can recover from problems and define completion accurately.

My Development Notes

Trainer Feedback

Assessment Date	
Score / Result	
Development Required	
Reassessment Date	

STAGE 5

FINAL CERTIFICATION CAPSTONE

What happens when the script runs out?

Stage 5: Final Certification Capstone

MODULE 1

Preparing for Final Certification

MODULE OBJECTIVE
Integrate all four qualification stages and demonstrate independent judgment, integrity and readiness to represent Claim My Legacy.

What You Need to Know

- Final certification is a capstone, not another teaching course.
- The standard rises to 90% plus required trust tests and no critical failure.
- The capstone includes an end-to-end family simulation, Unexpected Moment Exercise™, judgment/boundaries examination, documentation/self-assessment and the Certification Covenant.
- Certification does not mean knowing everything. It means knowing your responsibility, boundaries and when to ask for help.

Framework to Remember

THE FIVE FINAL TESTS
Parent Test • Family Test • Boundary Test • Integrity Test • Leadership Trust Test. All five must be YES.

Practice

What would you do if leadership pressured you to push a family forward when you believed the process should stop?

What would you do if you discovered your own mistake and believed nobody else would ever find it?

Candidate Reflection

What does being trusted with a family mean to you?

Where are you still most likely to need help?

Ready to Demonstrate

☐ I can protect the standard even under pressure.

☐ I can admit mistakes.

☐ I know when to ask for help.

☐ I am prepared for unpredictable scenarios.

STAGE REFERENCE

LEGACY SPECIALIST STOP RULE™

When in doubt, slowing down is better than confidently making the wrong decision.

The Legacy Specialist Stop Rule™

STOP
When something feels unclear, outside your role, unauthorized, unverified or simply wrong, slow the process down.

DO I KNOW?	If no → Clarify.
IS THIS WITHIN MY ROLE?	If no or uncertain → Refer.
DO I HAVE AUTHORIZATION?	If no or uncertain → Verify.
HAS IT ACTUALLY HAPPENED?	If no → Do not mark complete.
DOES SOMETHING FEEL WRONG?	If yes → Slow down and escalate.

My Personal Warning Signs

What behaviors or situations tell me I should slow down, ask for help or refer?

Certification Covenant Preparation

BEFORE YOU SIGN
The final Covenant is a commitment to how you will behave when nobody is supervising you. Read it carefully during final certification.

- ☐ I will seek to understand before I recommend.
- ☐ I will never use fear to create a problem that does not exist.
- ☐ I will distinguish what I know from what I assume.
- ☐ When I do not know, I will say so.
- ☐ I will stay inside my professional role and refer when required.
- ☐ I will protect confidential family information.
- ☐ I will respect YES, NOT YET, REFER and NO.
- ☐ I will not let compensation, convenience or pressure come before the family.
- ☐ If I make a mistake, I will disclose it appropriately and help correct it.
- ☐ I will verify before marking work complete.
- ☐ I will do what I say I will do.
- ☐ I will help make sure no family gets lost.

My Commitment in My Own Words

Academy Progress Record

Stage	Qualification	Date	Result	Trainer Initials
1	Foundation Qualified			
2	Conversation Qualified			
3	Family Legacy Review™ Qualified			
4	Client Experience Qualified			
5	Final Certification Capstone			

FINAL OUTCOMES

CERTIFIED • DEVELOPMENT REQUIRED • NOT YET READY

Final Notes

TRAINING TEACHES. PRACTICE DEVELOPS. CERTIFICATION PROVES READINESS.

Claim My Legacy™