

CLAIM MY LEGACY

TRUST FUNDING DIGITAL TOOLKIT™

QUICK START GUIDE

DISCOVER → REVIEW → REQUEST → SUBMIT → VERIFY → COMPLETE

You do not need to have everything figured out. You need to know your next step and take it.

The Trust Funding Assistance System™ is designed to help you carry your estate plan through to implementation one step at a time. You do not need to complete everything at once. Work through the system in order and use the supporting tools as needed.

START HERE

1. WATCH

Watch the short Start Here video before beginning. It explains how the Trust Funding Assistance System™ works and where to start.

2. OPEN YOUR DASHBOARD

Open the Master Trust Funding Dashboard™. Use it to keep track of each asset or account, its current stage, your next action, follow-up, and final status.

3. CHOOSE ONE ASSET OR ACCOUNT

Do not try to solve everything at once. Pick one account or asset and begin with 01 - DISCOVER.

4. FOLLOW THE PROCESS

Move that asset through REVIEW → REQUEST → SUBMIT → VERIFY. When it is finished, record the result and continue to the next asset.

THE ONE-ACCOUNT RULE™

If the process starts to feel overwhelming, pick one account. Take that one account through REVIEW → REQUEST → SUBMIT → VERIFY. Then move to the next one.

THE WORKING RULE

Don't guess. Document the question, identify who can answer it, and make getting that answer your next step.

IMPORTANT

This system helps organize, document, track, and verify implementation. It does not independently determine legal, tax, insurance, investment, or financial decisions. When professional judgment is required, pause and obtain appropriate guidance.

Your first step: Watch the Start Here video, open your Dashboard, and begin 01 - DISCOVER.