

FOR LEGACY SPECIALISTS

How to Use This Resource

What Does It Mean to Fund a Living Trust

WHAT IT IS

A client-facing article that explains why an unfunded trust offers zero protection, walks through the four funding steps in plain language, and closes with two paths to help: the Trust Funding Assistance System™ (self-guided) or a direct conversation with you. It's built as a template — your contact info goes in the editable block at the end.

BEFORE YOU SEND IT

- ☐ Fill in your name, phone, email, and booking link in the contact block
- ☐ Confirm the Trust Funding Assistance System™ link still points to the right start page
- ☐ Save your personalized version so you're not re-editing it every time

WHEN TO USE IT

SITUATION	WHAT TO DO
Just closed a trust	Send within 24–48 hours as the “next step” after signing.
Past client never funded	Use as a warm reason to re-engage — not a cold check-in.
Prospect has a trust elsewhere	Share it instead of pitching. Let it educate first.
Building a follow-up sequence	Make it touchpoint #1, driving into DISCOVER.
After a workshop or kitchen-table meeting	Leave it behind as a recap of what was discussed.
Training a new specialist	Use it as a model for Claim My Legacy's voice and tone.

A NOTE ON VOICE

This piece is written warm, jargon-free, and story-first — on purpose. If you personalize or adapt it, keep that same feel. It should sound like a conversation with someone who cares, not a legal notice.

QUESTIONS

Reach out to David or Rebecca anytime — we're happy to help you tailor this to your market.