



CML-FLR-105

FAMILY LEGACY REVIEW™ FOLLOW-UP SYSTEM

V1.1 | Legacy Specialist Guide

WHAT HAPPENS AFTER THE FAMILY LEGACY REVIEW™ WHEN THE FAMILY IS NOT READY TO MOVE FORWARD TODAY

Follow-up is not chasing.
It is completing the conversation the family asked to continue.

1 | The Purpose of Follow-Up

A Family Legacy Review™ does not fail because a family does not make a decision at the table. Some families need another person involved, want to review existing documents, need time to think, or simply are not ready that day.

**THE GOAL OF FOLLOW-UP IS NOT TO PRESSURE A YES.
THE GOAL IS TO KEEP THE AGREED NEXT STEP FROM DISAPPEARING.**

Before the Family Leaves

- Identify the real reason the conversation is continuing.
- Agree on the next action while everyone is still together.
- Whenever possible, schedule the follow-up before the family leaves.
- Record who needs to be involved and what information needs to be gathered.
- Confirm the family's preferred way to communicate.

Never End With Avoid

“Okay, think about it and call me.”

That leaves responsibility for an unfinished planning conversation entirely with the family and gives neither side a clear next step.

Use instead

“That makes sense. What would be the best next step from here?”

2 | The Follow-Up Path

REVIEW COMPLETED → REASON IDENTIFIED → NEXT STEP AGREED → FOLLOW-UP SCHEDULED → DECISION / CONTINUATION

Five Common Outcomes

FAMILY SAYS	YOUR OBJECTIVE	NEXT STEP
"I need to think about it."	Understand what they need to think through.	Agree on when to reconnect.
"I need to talk to my daughter/son."	Respect the trusted person's role.	Invite them into a follow-up conversation.
"I need to talk to my spouse."	Do not sell through an absent spouse.	Schedule a conversation with both.
"I already have a trust."	Return to uncertainties found in the Review.	Gather/review appropriate information; involve qualified professional when needed.
"I need to look at my documents first."	Help define what they are looking for.	Set a follow-up after they locate/review them.

3 | "I Need to Think About It"

Do not assume this is a price objection. First understand what remains unresolved.

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"Of course. When you say you'd like to think about it, what part would you like to give some more thought to?"

Listen. Their answer determines the next step.

If They Simply Need Time

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"That makes sense. Rather than leave this hanging, why don't we reconnect after you've had some time to talk it through? Would [agreed day/time] work?"

If a Specific Question Emerges

Answer it if it is within your role and you know the answer. If it requires legal, tax, insurance, financial, or other professional guidance, do not guess. Arrange for the appropriate answer or professional review.

DO NOT TURN "I NEED TO THINK" INTO A DEBATE.

4 | "I Need to Talk to My Daughter / Son"

This is often reasonable, especially when an adult child already helps with finances, healthcare, or family administration.

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"That makes sense. If they are someone you trust and they help you with these decisions, I can understand why you'd want them involved."

Then

“Would it be helpful if we scheduled a short follow-up with them included so we can show them what we discovered today and answer their questions?”

At the Follow-Up

- Do not restart the entire presentation.
- With the family's permission, summarize their priorities.
- Show the Family Protection Checkup and the areas they identified for review.
- Explain the Value Stack™ only as it relates to those areas.
- Answer questions within your role.
- Ask the family what they want to do next.

**DO NOT POSITION THE CHILD AS AN OBSTACLE TO OVERCOME.
TREAT THEM AS A TRUSTED PERSON THE FAMILY CHOSE TO INVOLVE.**

5 | “I Need to Talk to My Spouse”

When a spouse or partner is part of the planning decision but was not present, the preferred next step is usually to include them rather than asking the attendee to sell the plan at home.

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“I agree that this is something you should both be comfortable with. Let's make the next conversation easy. When could we sit down together so your spouse can see what we discovered and ask their own questions?”

Do Not

- Coach the attendee to pressure the absent spouse.
- Ask them to make a financial commitment the spouse should reasonably participate in.
- Send them home with a complicated explanation they now have to reproduce.
- Create artificial urgency to prevent the spouse from being involved.

Do

- Provide the Family Legacy Review™ Summary or appropriate take-home material.
- Agree on a date for the next conversation.
- Keep the follow-up focused on the family's discovered gaps.

6 | “I Already Have a Trust” / “I Want to Review My Documents”

An existing trust is not something to attack. It may be perfectly appropriate. The Family Legacy Review™ may simply have identified questions that deserve review.

Legacy Specialist

“Having a trust already is a good reason to make sure it still reflects what you want and that the pieces around it are working the way you expect. Today we identified a few things you're not completely sure about.”

Appropriate Follow-Up

- Ask the family to locate the relevant documents.
- Do not interpret legal provisions outside your role.
- Focus on factual questions such as dates, named decision-makers, asset ownership, beneficiary designations, and whether funding actions were completed.
- Refer legal interpretation to a qualified attorney when appropriate.
- Schedule the next conversation rather than leaving the review open-ended.

IDENTIFY UNCERTAINTY. DO NOT DECLARE ANOTHER PROFESSIONAL'S PLAN WRONG.

7 | Follow-Up Communication Sequence

Use judgment. The purpose is to honor the agreed next step, not create an automated pressure campaign.

WHEN	PURPOSE	ACTION
Same day / after meeting	Confirm what was agreed.	Send a brief thank-you and recap of the next step.
Before scheduled follow-up	Reduce missed appointments.	Send a simple confirmation/reminder.
Scheduled follow-up	Continue the decision conversation.	Call or meet as agreed.
If they miss the follow-up	Re-establish contact respectfully.	One brief message asking whether they want to reschedule.
If no response	Respect the family.	Do not repeatedly chase. Move to appropriate long-term nurture according to Claim My Legacy policy.

Record Every Follow-Up

- Date and method of contact.
- What the family said.
- Who needs to be involved.
- What was promised by Claim My Legacy.
- Next action and date.
- Final outcome.

8 | Ready-to-Use Follow-Up Language

Same-Day Text

“Thank you for sitting down with me today for your Family Legacy Review™. I appreciate the opportunity to learn what matters most to your family. As we discussed, our next step is [NEXT STEP]. I have us reconnecting on [DAY/DATE]. If anything comes up before then, please let me know.”

Same-Day Email Subject

Your Family Legacy Review™ — Next Step

Same-Day Email

“Thank you for taking the time to complete your Family Legacy Review™ today. We identified the areas that appear protected and the areas that deserve additional attention. Most importantly, we clarified what matters most to you and your family.

As we agreed, the next step is: [NEXT STEP].

We are scheduled to reconnect on [DATE/TIME]. I look forward to continuing the conversation.”

Follow-Up Reminder

“Just a quick reminder that we're scheduled to reconnect [DAY/TIME] regarding your Family Legacy Review™. I look forward to speaking with you.”

Missed Follow-Up

"I wanted to check in because we missed each other for our Family Legacy Review™ follow-up. If you'd still like to continue the conversation, I'm happy to find another time that works for you."

9 | When the Answer Is No

A respectful no is still a completed conversation.

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"I understand. I'm glad we were able to go through the Review so you have a clearer picture of where things stand. If your circumstances change or you have questions later, we're here to help."

Do Not

- Argue with the decision.
- Use fear about what will happen if they do not buy.
- Keep contacting someone who has clearly asked not to be contacted.
- Treat a no as a personal rejection.

Do

- Record the outcome accurately.
- Honor communication preferences.
- Leave the relationship intact.
- Make sure any promise you made during the Review is completed.

A FAMILY SHOULD FEEL RESPECTED WHETHER THE ANSWER IS YES, NOT YET, OR NO.

10 | Follow-Up Completion Checklist

- ☐ Family Legacy Review™ completed.
- ☐ Family's top priorities documented.
- ☐ Family Protection Checkup completed.
- ☐ Reason for continuing the conversation understood.
- ☐ Trusted person / spouse involvement identified if applicable.
- ☐ Questions requiring professional guidance identified.
- ☐ Agreed next step documented.
- ☐ Follow-up date/time scheduled when appropriate.
- ☐ Same-day recap sent.
- ☐ Case Management / Client Journey updated.
- ☐ Follow-up completed as promised.
- ☐ Final outcome recorded.

The Claim My Legacy Follow-Up Rule

FOLLOW-UP IS NOT CHASING.

**KEEP YOUR PROMISE.
HONOR THE FAMILY'S TIMELINE.
MAKE THE NEXT STEP CLEAR.**

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.