

PRESENTING THE RECOMMENDATION™

Discovery first. Recommendation second.

THE STANDARD

A recommendation should feel like the natural conclusion of a conversation the family has already helped create.

THE CONVERSATION FLOW

1. WHAT YOU TOLD ME	Return to the family's priorities.
2. WHAT WE DISCOVERED	Reflect what appears addressed, uncertain, or deserving attention.
3. WHAT I RECOMMEND	Explain the appropriate CML next step based on what was actually discovered.
4. WHY IT FITS	Connect the recommendation to Documents + Funding + Organization + Family.
5. INVESTMENT	State the investment clearly and accurately.
6. ASK	Use the approved next-step question.
7. LISTEN	Allow silence and respond to the family's actual answer.

EARN THE RIGHT TO RECOMMEND

Do not begin recommending a trust, package, or service because you think you already know what the family needs. Complete meaningful discovery first.

DISCOVERY FIRST. RECOMMENDATION SECOND.

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

DO NOT MANUFACTURE THE GAP

Use questions to uncover what actually exists. Do not use fear, assumptions, or legal-document diagnosis to create a problem.

PRESENT THE RECOMMENDATION IN PLAIN ENGLISH

Do not unload document names or recite a feature list. Explain what Claim My Legacy™ can help the family accomplish in the areas that matter to them.

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

THE CML VALUE STACK™

DOCUMENTS

Explain applicable planning components by what they are intended to accomplish.

FUNDING

Explain that creating a trust and coordinating appropriate assets with the plan are different steps. Keep professional decisions with the appropriate professionals.

ORGANIZATION

Help the family picture the day a successor trustee, child, or trusted person may need to find and understand the plan.

FAMILY

Bring the conversation back to the people the plan is designed to protect.

CONNECT, DON'T DUMP

- Connect each value area to something the family actually said or discovered.
- Use only the components relevant to the approved recommendation.
- Do not overwhelm the family with everything Claim My Legacy™ offers.
- Do not imply that every family needs the same solution.

SUMMARIZE BEFORE YOU RECOMMEND

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

“Based on what we've gone through today, there are several areas that deserve some attention. Does that sound like a fair summary?”

DOCUMENTS + FUNDING + ORGANIZATION + FAMILY

COMMUNICATING VALUE & INVESTMENT

Price comes after discovery, priorities, and value. Once the family understands what was discovered and how Claim My Legacy™ may help, present the investment clearly.

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

THEN STOP TALKING.

Give the family room to absorb the information. Silence is not a problem to fix.

DO

- **State the investment clearly and confidently.**
- Connect the investment to the areas identified during the conversation.
- Give the family a moment to think.
- Answer the question they actually ask.
- Respect a spouse, child, advisor, attorney, or other trusted person the family wants involved.

DO NOT

- Apologize for the price or say, “It’s only \$1,995.”
- Immediately offer a discount.
- Attack attorneys, competitors, or online providers.
- Keep talking because silence feels uncomfortable.
- **Do not misrepresent CML package terms, included services, comparisons, or claims.**

USING THE \$4,500+ COMPARISON

Where the approved local attorney comparison is used, present it only with the current qualification: estate-planning fees vary by attorney or provider, plan complexity, family circumstances, and services included. The \$4,500+ figure reflects local pricing observed by Claim My Legacy and is not intended to represent every attorney's fee.

ASK FOR THE DECISION

“Based on everything we've discovered today, would you like us to help you get this taken care of?”

ASK. THEN LISTEN.

Do not answer the question for them. Do not rescue the silence. Let the family decide.

VALUE BEFORE PRICE. CLARITY BEFORE PRESSURE.

RESPOND TO THE FAMILY'S ACTUAL ANSWER

YES

Move into the approved next step. Confirm what happens next.

A QUESTION

Answer what was actually asked. Route professional-advice questions appropriately.

A CONCERN

Understand the concern before responding. Do not treat hesitation as something to defeat.

SOMEONE ELSE NEEDS TO BE INVOLVED

Respect the relationship. Establish who should be included and a specific follow-up.

NOT NOW / I NEED TO THINK

Respect the answer. Ask whether information is still needed and leave a clear path to reconnect if appropriate.

FIELD GUARDRAILS

Always

- Recommend only after meaningful discovery.
- Use the family's priorities to explain why a next step may fit.
- **Present CML services accurately and state the investment clearly.**
- Separate uncertainty from fact.
- Refer individualized legal, tax, investment, financial, or insurance questions appropriately.

Never

- Diagnose whether a legal document is valid, defective, or legally sufficient.
- Tell a family every will must go through probate or every trust avoids probate.
- Promise a particular tax, probate, creditor, or asset-transfer result.
- Use fear or exaggerated consequences to force a decision.
- **Misrepresent CML package terms, qualifications, claims, or comparisons.**

FIELD REMINDER

The goal is not to convince every family to buy something. Help people understand what matters, what was discovered, what options are available, and what next step makes sense for them.

A GOOD CLOSE PRESERVES CHOICE AND CREATES CLARITY.

FIELD QUICK REFERENCE

1. RETURN TO THEIR WORDS

"You told me the most important things are..."

2. REFLECT WHAT YOU FOUND

"Based on what we've gone through today..."

3. CONNECT THE RECOMMENDATION

"Let me show you how we help families address the things we just identified."

4. PRESENT VALUE

Documents + Funding + Organization + Family.

5. STATE THE INVESTMENT

Present the \$1,995 CML model clearly. Do not apologize. Pause.

6. ASK

"Based on everything we've discovered today, would you like us to help you get this taken care of?"

7. LISTEN

Yes, question, concern, trusted person, or not now: respond to the answer actually given.

USE CURRENT APPROVED MATERIALS

Legacy Specialists should always use the current materials available in this resource center rather than previously saved or downloaded versions.

PRODUCTION CONTROL

Document: CML-SC-104 Presenting the Recommendation™ Field Guide

Audience: Claim My Legacy™ Legacy Specialists

Edition: Production V1.3 - Binder Ready

Use: Internal field resource; recommendation and decision-conversation support

Control: Use the current approved version available in Legacy Specialist Resources.

EDUCATIONAL / SCOPE NOTICE

This field guide supports approved Claim My Legacy™ educational and service conversations. It is not legal, tax, investment, financial, or insurance advice and must not be used to provide individualized professional advice or to diagnose legal documents. Individual circumstances vary, and appropriate professional guidance may be needed.

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