

# Trust Funding Assistance System™

Legacy Specialist Quick Start Guide | Companion to the training video

**Your Role: Organize, Support, Document, and Refer, if Needed.**

## HELP THE FAMILY FOLLOW THROUGH

Signing a trust is an important milestone. Help the family organize information, work through administrative steps, track progress, and retain available confirmation. Stay within the agreed service scope and obtain appropriate guidance when professional judgment is needed.

### 1. WATCH THE TRAINING

Watch **Trust Funding Assistance - Legacy Specialist Training**. The complimentary Trust Funding Review™ helps identify questions and items needing attention. Trust Funding Assistance™ supports administrative follow-through.

### 2. OPEN THE SYSTEM MATERIALS

Locate the book, Digital Toolkit, and Master Trust Funding Dashboard™. Review the toolkit folders and correspondence library. Keep each family's working records organized and use approved information-handling procedures.

### 3. PRACTICE WITH ONE FICTIONAL ASSET

Before assisting a family, practice recording one fictional asset on the dashboard. Identify the current stage, next action, responsible person, follow-up, and confirmation needed. Label all practice information as fictional.

### 4. BEGIN WITH QUESTIONS

Ask: "What instructions were you given?" "Which steps have you completed?" "How did you confirm the changes were accepted?" Listen before drawing conclusions. Distinguish what the family reports from what the records confirm.

## KEEP THE FAMILY INVOLVED

Explain what has been done, what remains open, who needs to act next, and what confirmation is still needed. Ask: "Which of these remaining items would you like help working through first?"

**Start with one asset. Identify one clear next step. Document what happens. Then continue.**

# Guide the Follow-Through

DISCOVER → REVIEW → REQUEST → SUBMIT → VERIFY → COMPLETE

|                 |                                                                                                                                                                                                         |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>DISCOVER</b> | Gather relevant records and the family's understanding of the asset, ownership, beneficiary designations, prior instructions, and completed actions.                                                    |
| <b>REVIEW</b>   | Identify what is known, what is unclear, and who can provide direction. Do not independently decide legal or tax treatment. Confirm appropriate direction before helping with a change.                 |
| <b>REQUEST</b>  | Use the relevant template to request current forms, requirements, instructions, or information. Verify the recipient and client details. A template does not replace institution-specific requirements. |
| <b>SUBMIT</b>   | Help organize required materials and follow the institution's instructions. Obtain necessary client approvals and signatures. Record what was submitted and when.                                       |
| <b>VERIFY</b>   | Follow up and retain available written confirmation. Check whether the requested action was accepted and identify anything still outstanding.                                                           |
| <b>COMPLETE</b> | Record the documented result on the dashboard. Keep unresolved items visible with an accurate status and next action. Sending paperwork does not, by itself, establish completion.                      |

## THE ONE-ACCOUNT RULE™

If the process feels overwhelming, help the family choose one asset or account. Work through the applicable stages, document the result, and then move to the next one.

## THE WORKING RULE

Do not guess. Document the question, identify who can answer it, and make obtaining that answer the next step.

## PROTECT INFORMATION. REFER WHEN NEEDED.

Collect only what is needed for the task and follow approved handling procedures. The system supports organization, documentation, tracking, and verification. It does not authorize legal, tax, insurance, investment, or financial advice. Pause the affected action and obtain appropriate guidance when needed.

**Understand it. Get it done. Make it work. | Love deserves a plan.**