

CLAIM MY LEGACY

MASTER TRUST FUNDING DASHBOARD™

Your financial life. One place. One process.

Client / Family: _____	Trust Name: _____
Trust Date: _____	Date Started: _____
Target Completion Date: _____	Next Review Date: _____

DISCOVER → REVIEW → REQUEST → SUBMIT → VERIFY → COMPLETE

Asset / Account	Institution	REVIEW Decision	Current Stage	Next Action	Follow-Up	Final Status

FINAL STATUS OPTIONS
VERIFIED COMPLETE | ACTION PENDING | CLIENT ACTION REQUIRED | CORRECTION REQUIRED | PROFESSIONAL GUIDANCE REQUIRED | NO ACTION REQUIRED

MY NEXT THREE ACTIONS™

ACTION 1

What: _____

When: _____ ■ COMPLETE

ACTION 2

What: _____

When: _____ ■ COMPLETE

ACTION 3

What: _____

When: _____ ■ COMPLETE

THE ONE-ACCOUNT RULE™

If this 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 BOUNDARY

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.

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