

# Legacy Plan Starter

*Will, beneficiaries, instructions to family. AI drafts. Lawyer signs.*

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If you died this week your family would inherit chaos before they inherited a dollar. Today is the first 80% — what AI can draft. The last 20% is what a lawyer makes real.

## Action checklist

- Open Claude. Ask for a Legacy Plan Starter document with sections for:
  - Will summary (intent, not legal text)
  - Beneficiary check — every major account
  - Letter to your wife — practical (passwords, accounts, who to call)
  - Letter to each child — what you want them to know
  - Funeral preferences
- Fill in your information offline. Do not paste account numbers into AI.
- Book a 30-minute call with an estate attorney to make the will real.
- Tell your wife where the document lives.

### THE UNFUNDED TRUST

A trust that exists on paper but holds no assets is a comforting lie. Get the document — then fund it.

## Scripture sit

*Proverbs 13:22 — "A good man leaves an inheritance to his children's children." Inheritance is documents and follow-through, not just dollars.*

## What I noticed

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## Captain's next move

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