

Legacy Plan Starter

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

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

Captain's next move
