

LegacyIQ
how to jump (like this new name for base camp)

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The Worlds Most
Intelligently Secure
Estate Planning Platform

Revolutionize Your
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AI

LegacyIQ transforms the estate planning process with cutting-edge AI technology, making it easier and for attorneys and financial professionals to connect with their clients. Experience secure document creation, asset tracking, and risk management in one efficient platform.

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LegacyIQ Workflow

Revolutionizing Estate Planning:
Your AI-Powered Assistant
for Success

Our RAG AI Agent streamlines the estate planning process, making it faster and more efficient. It empowers estate planners, financial advisors, attorneys and wealth managers to focus on what truly matters—serving their clients.

Smart Automation

Enhanced Tracking

Streamline Your Estate Planning with Our
Supercharged Automation RAG Agent

Maximize Efficiency with Comprehensive
Asset Tracking Solutions

Mitigate Risks with our
Secure AI Automation Tools

Enhance Collaboration Between Attorneys
and Wealth Managers Effortlessly

Customer Testimonials

LegacyIQ Transformed our estate planning process completely.

★★★★★

"We promised, using LegacyIQ has streamlined our workflow significantly!"

○

Jane Doe
Estate Planner, Estate Planners Corp

★★★★★

"This speeds up our client intake process freeing up time for our portfolio!"

○

Jane Smith
Financial Manager, XYZ Corp

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Financial Manager, XYZ Corp

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"I can't imagine working our secure documents with another knowledge base!"

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Michael Brown
Partner, MLN PC

Start Your Free Trial Today

Experience our modernized RAG AI Agent at work for your estate planning needs.

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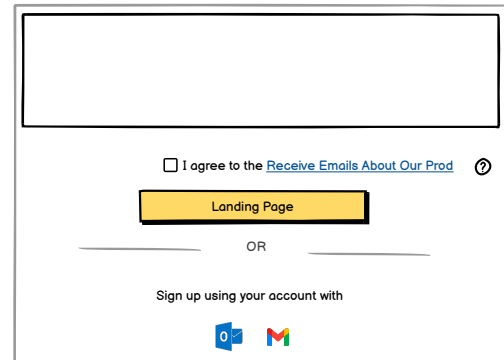
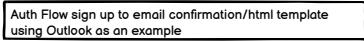
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