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Legacy IQ

The Worlds Most
Intelligently Secure
Estate Planning Platform

Revolutionize Your
Estate Planning with
AI

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

[Get Started](#)[Learn more](#)

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

Automate Document creation and improve efficiency

Enhanced Tracking

Effortlessly track assets and manage risks with real-time insights

Streamline Your Estate Planning with Our
Supercharged Automation RAG Agent

Maximize Efficiency with Comprehensive
Asset Tracking Solutions

Our secure AWS S3 Document Buckets securely store documents and allow document creation automation for a simplified drafting process, saving on costs, time, and efforts.

[Learn More](#)

Mitigate Risks with our
Secure AI Automation Tools

Stay ahead of your time issues with our integrated and secure systems.

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Enhance Collaboration Between Attorneys
and Wealth Managers Effortlessly

Our platform fosters seamless communication ensuring everyone is on the same page.

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Customer Testimonials

LegacyIQ Transformed our estate planning process completely

★★★★★

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

John Doe
Estate Planner, Estate Planners Corp

★★★★★

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

John Smith
Financial Manager, XYZ Corp

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

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★★★★★

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

Michael Brown
Partner, P&LH PC

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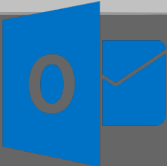
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Outlook Email Client

https://outlook.office365.com/mail/



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