Awesome—thanks for the green lights. Below are **two mermaid.live diagrams** for your dev handoff:

1. a **clean/render-ready** pair of flowcharts (one for each legal matter type)
2. an **annotated/dev-notes** pair with granular subtasks, automation triggers, and system dependencies embedded as %% comments.

Both versions reflect:

* Major stages **and** granular subtasks
* Full **branching options** (incl. pricing add-ons)
* **Fork** to skip the “50-Point Trust Review” if client has nothing to review
* Intake homework that pipes answers from your assessment, checklist, and family wealth inventory into the **Client Contact** and **Matter** records and makes them available as a **reviewable/extractable file** for downstream document automation
* Automatic **move to Annual Review pipeline** and **billing subscription sync** on completion

# **CLEAN / RENDER-READY (paste into mermaid.live)**

****flowchart TD

%% ====== WORKFLOW 1: LIFE & LEGACY ESTATE PLANNING ======

subgraph L1[Life & Legacy: Lead → Fully Funded Trust + Maintenance]

direction TB

L1\_A[Lead Captured]

L1\_B[Conflict Check]

L1\_C{Conflict?}

L1\_D[Decline & Close - Conflict]

L1\_E[Convert to Contact + Matter]

L1\_F[Qualification Call / Contact]

L1\_G{Qualified?}

L1\_H[Disqualify & Nurture]

L1\_I[Book Life & Legacy Planning Session ($950)]

L1\_J[Send Intake Homework Package]

L1\_K[Client Completes: Assessment • Checklist • Family Wealth Inventory]

L1\_L[Auto-Create Intake File + Map to CRM Fields]

L1\_M[50-Point Trust Review?]

L1\_M1[Yes: Schedule Trust Review Session]

L1\_M0[No: Skip Review]

L1\_N[Life & Legacy Planning Session Held]

L1\_O{Recommendations Selected?}

L1\_O0[Follow-up Needed → Schedule]

L1\_P[Engagement Letter + eSign]

L1\_Q[Collect Initial Payment]

L1\_R[Drafting Queue]

L1\_S[Document Generation]

L1\_T[Optional Add-Ons Selected]

L1\_T1[Spouse Asset Protection Order (+$)]

L1\_T2[Kids Asset Protection Orders (+$)]

L1\_T3[Kids Protection Plan (+$)]

L1\_T4[Will Redesign (+$)]

L1\_T5[Advanced Healthcare Directives (+$)]

L1\_U[Review Session (Trust Review)]

L1\_V{Revisions Needed?}

L1\_V1[Revise Documents]

L1\_W[Execute + Notarize + Record Where Required]

L1\_X[Funding Checklist Issued]

L1\_Y[Funding Verification: Accounts, Titles, Beneficiaries]

L1\_Z[Fully Funded Trust Confirmed]

L1\_AA[Enroll in Maintenance Program]

L1\_AB[Move to Annual Review Pipeline]

L1\_AC[Sync Recurring Billing Subscription]

L1\_AD[Matter Closed → Ongoing Maintenance]

L1\_A --> L1\_B --> L1\_C

L1\_C -- Yes --> L1\_D

L1\_C -- No --> L1\_E --> L1\_F --> L1\_G

L1\_G -- No --> L1\_H

L1\_G -- Yes --> L1\_I --> L1\_J --> L1\_K --> L1\_L --> L1\_M

L1\_M -- Yes --> L1\_M1 --> L1\_N

L1\_M -- No --> L1\_M0 --> L1\_N

L1\_N --> L1\_O

L1\_O -- No --> L1\_O0

L1\_O -- Yes --> L1\_P --> L1\_Q --> L1\_R --> L1\_S --> L1\_T

L1\_T --> L1\_T1 & L1\_T2 & L1\_T3 & L1\_T4 & L1\_T5

L1\_T --- L1\_U

L1\_S --> L1\_U --> L1\_V

L1\_V -- Yes --> L1\_V1 --> L1\_U

L1\_V -- No --> L1\_W --> L1\_X --> L1\_Y --> L1\_Z --> L1\_AA --> L1\_AB --> L1\_AC --> L1\_AD

end

%% ====== WORKFLOW 2: WYOMING ASSET PROTECTION TRUST (APT) ======

subgraph W1[Wyoming APT: Lead → Trust Created + Maintenance]

direction TB

W1\_A[Lead Captured]

W1\_B[Conflict Check]

W1\_C{Conflict?}

W1\_D[Decline & Close - Conflict]

W1\_E[Convert to Contact + Matter]

W1\_F[Book Paid Appointment ($350)]

W1\_G[Send APT Intake + Questionnaire]

W1\_H[Client Completes APT Intake]

W1\_I[Auto-Create Intake File + Map to CRM Fields]

W1\_J[Appointment Held (APT Strategy)]

W1\_K[Engagement Letter + eSign]

W1\_L[Collect Initial Payment]

W1\_M[APT Drafting Queue]

W1\_N[WY APT Document Generation]

W1\_O[Ancillary Docs: Trustees, Banking, Funding Instructions]

W1\_P[Review Session]

W1\_Q{Revisions Needed?}

W1\_Q1[Revise Documents]

W1\_R[Execute + Notarize]

W1\_S[Trust Funding & Titling]

W1\_T[Maintenance Program Enrollment]

W1\_U[Move to Annual Review Pipeline]

W1\_V[Sync Recurring Billing Subscription]

W1\_W[Matter Closed → Ongoing Maintenance]

W1\_A --> W1\_B --> W1\_C

W1\_C -- Yes --> W1\_D

W1\_C -- No --> W1\_E --> W1\_F --> W1\_G --> W1\_H --> W1\_I --> W1\_J --> W1\_K --> W1\_L --> W1\_M --> W1\_N --> W1\_O --> W1\_P --> W1\_Q

W1\_Q -- Yes --> W1\_Q1 --> W1\_P

W1\_Q -- No --> W1\_R --> W1\_S --> W1\_T --> W1\_U --> W1\_V --> W1\_W

end



# **ANNOTATED / DEV-NOTES (paste into mermaid.live)**

This version includes **granular subtasks**, **automation triggers**, and **system dependencies** as %% comments so your engineers know exactly what to wire up.

flowchart TD

%% ============================================================

%% WORKFLOW 1: LIFE & LEGACY ESTATE PLANNING (with options)

%% ============================================================

subgraph L1[Life & Legacy: Lead → Fully Funded Trust + Maintenance]

direction TB

%% ========== LEAD & CONFLICT ==========

L1\_A[Lead Captured]

%% TRIGGER: Web form submit / phone intake / referral import

%% DEP: Forms module, Marketing Sources, Referrers

L1\_B[Conflict Check]

%% ACTIONS: Search contacts, matters, notes, files

%% AUTO: If no match → auto-approve; if potential match → manual review

%% DEP: Conflict engine enabled; index of names/entities

L1\_C{Conflict?}

L1\_D[Decline & Close - Conflict]

%% ACTION: Notify lead via template; log outcome; add to conflict list

%% DEP: Email templates; eSign not needed

L1\_E[Convert to Contact + Matter]

%% ACTIONS: Create Contact, Matter; map source/campaign; assign owner

%% AUTO: Tag practice area = Estate Planning

%% DEP: Pipelines > Estate Planning; Practice Areas; Default folder set

%% ========== QUALIFICATION & APPT ==========

L1\_F[Qualification Call / Contact]

%% SUBTASKS:

%% - Verify goals, household members, urgency, decision makers

%% - Confirm preferred venue (Zoom/Office/Phone)

%% - Offer session ($950) and explain deliverables

%% AUTO: Log call; set tentative stage

%% DEP: Calendars (Google/Outlook); Call/SMS integration

L1\_G{Qualified?}

L1\_H[Disqualify & Nurture]

%% AUTO: Add to nurture sequence; schedule check-in

%% DEP: Marketing campaigns; segments

L1\_I[Book Life & Legacy Planning Session ($950)]

%% TRIGGER: Scheduling link w/payment collection

%% DEP: Appointment Types; LIFTed Pay gateway; Zoom integration

%% ========== INTAKE HOMEWORK ==========

L1\_J[Send Intake Homework Package]

%% CONTENTS: Assessment (PDF/Doc), Checklist (Doc), Family Wealth Inventory (Sheet)

%% LINKS:

%% - Assessment: Google Drive (provided)

%% - Checklist: Google Doc (provided)

%% - Family Wealth Inventory: Google Sheet (provided)

%% ACTIONS:

%% - Create client-specific intake form bundle (prefill known data)

%% - Enable portal access; deadline + SMS/email reminders (24h/4h)

%% DEP: Forms; Portal; Google Drive API (read templates)

L1\_K[Client Completes: Assessment • Checklist • Family Wealth Inventory]

%% TRIGGER: On submit (all complete)

%% VALIDATION: Required fields; uploads; signature if needed

L1\_L[Auto-Create Intake File + Map to CRM Fields]

%% ACTIONS:

%% - Generate a single compiled PDF (Assessment answers + Checklist + Inventory snapshot)

%% - Write atomic fields to Contact & Matter custom fields (for doc merge)

%% - Store raw dataset (CSV/JSON) as file

%% DEP: Doc assembly; Field mapper; File store; Data schema

%% ========== REVIEW BRANCHING ==========

L1\_M{Existing Trust to Review?}

%% SOURCE: Intake response; checkbox/yes-no

L1\_M1[Yes: Schedule Trust Review Session]

%% TRIGGER: Appointment created; queue 50-point review checklist

%% DEP: Appointment type = Trust Review; Checklist template

L1\_M0[No: Skip Review]

%% FLOW: Continue

%% ========== STRATEGY SESSION ==========

L1\_N[Life & Legacy Planning Session Held]

%% SUBTASKS:

%% - Confirm goals; scope; risks

%% - Walk through baseline + options

%% - Pricing matrix visible (base + add-ons)

%% DEP: Pricing table; Proposal/quote tool

L1\_O{Recommendations Selected?}

L1\_O0[Follow-up Needed → Schedule]

%% AUTO: Create follow-up task, email recap, re-open options

%% DEP: Tasks; Email templates

%% ========== ENGAGEMENT ==========

L1\_P[Engagement Letter + eSign]

%% ACTIONS: Merge fields from Contact/Matter/Intake; multi-signer support

%% DEP: Doc templates; eSign; conditional variants

L1\_Q[Collect Initial Payment]

%% DEP: LIFTed Pay; invoice creation; retainer/trust accounting if needed

%% ========== DRAFTING ==========

L1\_R[Drafting Queue]

%% ACTIONS: Assign drafter; set SLA; auto-create drafting tasks/subtasks

%% DEP: Task templates; SLAs; Role permissions

L1\_S[Document Generation]

%% ACTIONS: Generate Trust, Will, POA, HIPAA, etc.

%% LIMIT: Repeating children lists must be individually mapped if templating limits apply

%% DEP: Merge engine; Clause bank; Versioning

%% ========== OPTIONS & ADD-ONS ==========

L1\_T[Optional Add-Ons Selected]

L1\_T1[Spouse Asset Protection Order (+$)]

L1\_T2[Kids Asset Protection Orders (+$)]

L1\_T3[Kids Protection Plan (+$)]

L1\_T4[Will Redesign (+$)]

L1\_T5[Advanced Healthcare Directives (+$)]

%% ACTIONS: Each selection adds line-item pricing, tasks, and doc templates

%% DEP: Product catalog; Pricing; Task packs; Template packs

%% ========== REVIEW / REVISE / EXECUTE ==========

L1\_U[Review Session (Trust Review)]

%% ACTIONS: Walk client through drafts; collect change requests

%% AUTO: Capture redlines; version diff stored

L1\_V{Revisions Needed?}

L1\_V1[Revise Documents]

%% LOOP until no revisions remain

L1\_W[Execute + Notarize + Record Where Required]

%% ACTIONS: Schedule signing; notary; record deeds if applicable

%% DEP: eNotary / in-person; County eRecording

%% ========== FUNDING ==========

L1\_X[Funding Checklist Issued]

%% CONTENT: Accounts, titles, beneficiaries, deeds, entities

L1\_Y[Funding Verification: Accounts, Titles, Beneficiaries]

%% ACTIONS: Gather proofs; update tracker; reminders

L1\_Z[Fully Funded Trust Confirmed]

%% GATE: All required proofs verified

%% ========== MAINTENANCE ==========

L1\_AA[Enroll in Maintenance Program]

%% OPTIONS: Tiered plans; SLA; hotline; periodic tune-ups

%% DEP: Product + subscription catalog

L1\_AB[Move to Annual Review Pipeline]

%% AUTO: Create annual review matter; schedule; reminders

L1\_AC[Sync Recurring Billing Subscription]

%% DEP: Billing system; tokenized payment method; dunning

L1\_AD[Matter Closed → Ongoing Maintenance]

%% ACTION: Archive working matter; keep maintenance matter open

%% FLOW LINES

L1\_A --> L1\_B --> L1\_C

L1\_C -- Yes --> L1\_D

L1\_C -- No --> L1\_E --> L1\_F --> L1\_G

L1\_G -- No --> L1\_H

L1\_G -- Yes --> L1\_I --> L1\_J --> L1\_K --> L1\_L --> L1\_M

L1\_M -- Yes --> L1\_M1 --> L1\_N

L1\_M -- No --> L1\_M0 --> L1\_N

L1\_N --> L1\_O

L1\_O -- No --> L1\_O0

L1\_O -- Yes --> L1\_P --> L1\_Q --> L1\_R --> L1\_S --> L1\_T

L1\_T --> L1\_T1 & L1\_T2 & L1\_T3 & L1\_T4 & L1\_T5

L1\_T --- L1\_U

L1\_S --> L1\_U --> L1\_V

L1\_V -- Yes --> L1\_V1 --> L1\_U

L1\_V -- No --> L1\_W --> L1\_X --> L1\_Y --> L1\_Z --> L1\_AA --> L1\_AB --> L1\_AC --> L1\_AD

end

%% ============================================================

%% WORKFLOW 2: WYOMING ASSET PROTECTION TRUST (APT)

%% ============================================================

subgraph W1[Wyoming APT: Lead → Trust Created + Maintenance]

direction TB

W1\_A[Lead Captured]

%% TRIGGER: Web form/referral/import

%% DEP: Marketing sources/referrers

W1\_B[Conflict Check]

W1\_C{Conflict?}

W1\_D[Decline & Close - Conflict]

W1\_E[Convert to Contact + Matter]

%% PRACTICE: Asset Protection (Wyoming APT)

%% FOLDERS: Default APT folder set

W1\_F[Book Paid Appointment ($350)]

%% DEP: Scheduling + LIFTed Pay; Zoom

W1\_G[Send APT Intake + Questionnaire]

%% SOURCE: APT questionnaire (provided Google Doc)

%% AUTO: Prefill; portal; reminders (48h/24h/4h)

W1\_H[Client Completes APT Intake]

W1\_I[Auto-Create Intake File + Map to CRM Fields]

%% Write fields → Contact & Matter; store compiled PDF + raw JSON/CSV

W1\_J[Appointment Held (APT Strategy)]

%% SUBTASKS: Asset map, trustee choices, banking, situs, funding plan, charging order protection

W1\_K[Engagement Letter + eSign]

W1\_L[Collect Initial Payment]

%% Retainer/trust accounting if applicable

W1\_M[APT Drafting Queue]

%% Assign drafter; SLA; tasks created

W1\_N[WY APT Document Generation]

%% Trust, assignment docs, Schedules A/B, powers, letters of wishes as applicable

W1\_O[Ancillary Docs: Trustees, Banking, Funding Instructions]

%% Bank letters, EIN support, trustee acceptance, protector docs if applicable

W1\_P[Review Session]

W1\_Q{Revisions Needed?}

W1\_Q1[Revise Documents]

W1\_R[Execute + Notarize]

%% In-person or remote per state allowances

W1\_S[Trust Funding & Titling]

%% Deeds, entity interests, brokerage accounts, bank accounts; proof collection

W1\_T[Maintenance Program Enrollment]

W1\_U[Move to Annual Review Pipeline]

W1\_V[Sync Recurring Billing Subscription]

W1\_W[Matter Closed → Ongoing Maintenance]

%% FLOW LINES

W1\_A --> W1\_B --> W1\_C

W1\_C -- Yes --> W1\_D

W1\_C -- No --> W1\_E --> W1\_F --> W1\_G --> W1\_H --> W1\_I --> W1\_J --> W1\_K --> W1\_L --> W1\_M --> W1\_N --> W1\_O --> W1\_P --> W1\_Q

W1\_Q -- Yes --> W1\_Q1 --> W1\_P

W1\_Q -- No --> W1\_R --> W1\_S --> W1\_T --> W1\_U --> W1\_V --> W1\_W

end

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## **Implementation notes for your devs (concise)**

* **Intake → Field Mapping**
  + Create a **Field Map** where each Q/A from the **Assessment**, **Checklist**, and **Family Wealth Inventory** is mapped to:  
    - a **Contact custom field**,
    - a **Matter custom field**, and
    - a **compiled “Intake Package” PDF** plus **raw JSON/CSV** stored in the Matter Files.
  + These fields become the **single source of truth** for **document merge** and **pricing logic**.
* **Pricing / Options**
  + Implement a **product catalog** with base offering + add-ons. Each selection programmatically:  
    - adds **line items** to the agreement/invoice,
    - **spawns task packs** and **includes templates** for the selected add-on,
    - updates **estimates** shown during the session.
* **Automation Triggers**
  + Email/SMS reminders on: intake not started, in progress, and due.
  + Appointment confirmations + reminders (email/SMS).
  + On **eSign complete** → move pipeline stage automatically.
  + On **Funding Verified** → enroll in maintenance plan, create **Annual Review** matter, and start **billing subscription**.
* **Dependencies**
  + Calendars (Google/Outlook), Zoom, eSign, Payments (LIFTed Pay), Conflict engine, Doc assembly, Portal, Marketing campaigns, QuickBooks (optional), and **Round-robin scheduling** (future enhancement).
* **Security & Audit**
  + Save all intake and doc versions with **immutable audit trail** and **timestamped events**.
  + Ensure **PII encryption at rest** and **role-based access** for folders (Attorney/Paralegal/Client Portal views).

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Danny not sure you needed this or not but see JSON files below if they are helpful from ChatGPT

Awesome — here are **ready-to-ingest JSON task packs per stage** for both workflows. They’re designed to seed your system with: stages, granular tasks/subtasks, SLAs, owners, triggers, dependencies, form/doc template bindings, pricing add-ons, and automation hooks.

Conventions:

* Replace {{placeholders}} with your actual IDs/URLs.
* Durations use ISO 8601 (e.g., PT24H, P7D).
* owner\_role is a suggestion; your system can map to a user.
* on\_complete supports multiple actions (webhooks, subscriptions, pipeline moves, etc.).

# **1) Life & Legacy Estate Planning — JSON Task Packs**

****{

"workflow\_key": "life\_legacy\_estate\_planning\_v1",

"name": "Life & Legacy: Lead → Fully Funded Trust + Maintenance",

"pipeline": "Estate Planning",

"stages": [

{

"stage\_key": "lead\_captured",

"name": "Lead Captured",

"sla": "PT4H",

"owner\_role": "Intake\_Specialist",

"entry\_triggers": [

"lead\_form\_submitted",

"referral\_imported",

"phone\_intake\_logged"

],

"tasks": [

{

"task\_key": "verify\_source\_referrer",

"name": "Verify source & referrer attribution",

"owner\_role": "Intake\_Specialist",

"due\_in": "PT2H",

"subtasks": [

"Confirm marketing source & campaign",

"Attach referral contact (if any)",

"Tag practice area = Estate Planning"

]

},

{

"task\_key": "create\_contact\_matter\_shell",

"name": "Create Contact & Matter shell",

"owner\_role": "Intake\_Specialist",

"due\_in": "PT2H",

"subtasks": [

"Create Contact with minimum fields",

"Create Matter with default folders",

"Assign matter owner (Attorney of the Day)"

]

}

],

"on\_complete": [

{ "action": "move\_to\_stage", "stage\_key": "conflict\_check" }

]

},

{

"stage\_key": "conflict\_check",

"name": "Conflict Check",

"sla": "PT8H",

"owner\_role": "Conflicts\_Analyst",

"tasks": [

{

"task\_key": "run\_conflict\_search",

"name": "Run conflict search across CRM",

"owner\_role": "Conflicts\_Analyst",

"due\_in": "PT4H",

"dependencies": ["conflict\_engine\_enabled"],

"subtasks": [

"Search contacts, matters, notes, files",

"Screenshot/attach search results",

"Mark auto-approve if clean"

]

}

],

"outcomes": [

{ "label": "Conflict Found", "next": "decline\_close" },

{ "label": "No Conflict", "next": "qualification\_contact" }

]

},

{

"stage\_key": "decline\_close",

"name": "Decline & Close (Conflict)",

"sla": "PT2H",

"owner\_role": "Intake\_Specialist",

"tasks": [

{

"task\_key": "send\_decline\_notice",

"name": "Send conflict decline notice",

"owner\_role": "Intake\_Specialist",

"due\_in": "PT1H",

"templates": { "email": "{{tmpl\_conflict\_decline\_email\_id}}" }

}

],

"on\_complete": [{ "action": "close\_matter" }]

},

{

"stage\_key": "qualification\_contact",

"name": "Qualification Call / Contact",

"sla": "P1D",

"owner\_role": "Intake\_Specialist",

"tasks": [

{

"task\_key": "qual\_call",

"name": "Qualification call",

"owner\_role": "Intake\_Specialist",

"due\_in": "PT8H",

"checklist": [

"Confirm goals, household members, decision makers",

"Venue preference (Zoom/Office/Phone)",

"Explain $950 Planning Session deliverables"

],

"notes\_required": true

}

],

"outcomes": [

{ "label": "Qualified", "next": "book\_planning\_session" },

{ "label": "Not Qualified", "next": "nurture" }

]

},

{

"stage\_key": "nurture",

"name": "Disqualify & Nurture",

"sla": "P7D",

"owner\_role": "Marketing\_Coordinator",

"tasks": [

{

"task\_key": "add\_to\_nurture\_sequence",

"name": "Add to nurture campaign",

"owner\_role": "Marketing\_Coordinator",

"due\_in": "PT4H",

"automations": [

{ "type": "email\_campaign\_add", "campaign\_id": "{{cmp\_nurture\_id}}" },

{ "type": "schedule\_followup", "in": "P14D" }

]

}

],

"on\_complete": [{ "action": "stay\_in\_stage" }]

},

{

"stage\_key": "book\_planning\_session",

"name": "Book Life & Legacy Planning Session ($950)",

"sla": "P2D",

"owner\_role": "Intake\_Specialist",

"tasks": [

{

"task\_key": "send\_scheduling\_link",

"name": "Send scheduling link with payment",

"owner\_role": "Intake\_Specialist",

"due\_in": "PT4H",

"dependencies": ["calendar\_sync", "payments\_enabled"],

"templates": {

"email": "{{tmpl\_session\_link\_email\_id}}"

},

"automations": [

{ "type": "payment\_required\_booking", "amount": 950, "currency": "USD" },

{ "type": "create\_zoom\_meeting\_on\_book", "account": "{{zoom\_acct\_id}}" }

]

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "send\_intake\_homework" }]

},

{

"stage\_key": "send\_intake\_homework",

"name": "Send Intake Homework Package",

"sla": "PT12H",

"owner\_role": "Client\_Services",

"tasks": [

{

"task\_key": "issue\_intake\_bundle",

"name": "Issue Intake Bundle (Assessment, Checklist, Family Wealth Inventory)",

"owner\_role": "Client\_Services",

"due\_in": "PT6H",

"forms": [

{ "label": "Assessment", "url": "https://drive.google.com/file/d/1XNT6GruJ-D7T17xcQbjxY4zke8S4Uif0/view?usp=sharing" },

{ "label": "Checklist", "url": "https://docs.google.com/document/d/1f8InkRN\_PLg9NpqHnv-ONJahRj5IlQr-A4LI0m139Zs/edit?usp=sharing" },

{ "label": "FamilyWealthInventory", "url": "https://docs.google.com/spreadsheets/d/1v3nR1mvns34H92ftRNgkReyhy5RBTcJUgwFBj4WBQxc/edit?usp=sharing" }

],

"automations": [

{ "type": "portal\_invite" },

{ "type": "reminder\_sms\_email", "schedule": ["P0DT1H", "P1D", "PT4H\_before\_appt"] }

]

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "intake\_complete\_mapping" }]

},

{

"stage\_key": "intake\_complete\_mapping",

"name": "Intake Complete & Field Mapping",

"sla": "PT8H",

"owner\_role": "Data\_Specialist",

"tasks": [

{

"task\_key": "compile\_intake\_pdf",

"name": "Compile intake package PDF & raw data",

"owner\_role": "Data\_Specialist",

"due\_in": "PT4H",

"automations": [

{ "type": "generate\_compiled\_pdf", "filename": "Intake\_Package.pdf" },

{ "type": "store\_raw\_payload", "format": "JSON,CSV" }

]

},

{

"task\_key": "map\_fields",

"name": "Map intake fields → Contact & Matter custom fields",

"owner\_role": "Data\_Specialist",

"due\_in": "PT4H",

"dependencies": ["field\_mapper\_config"]

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "review\_branch" }]

},

{

"stage\_key": "review\_branch",

"name": "50-Point Trust Review Branch",

"sla": "P2D",

"owner\_role": "Paralegal",

"tasks": [

{

"task\_key": "branch\_on\_existing\_trust",

"name": "Branch on 'Existing Trust?' intake answer",

"owner\_role": "Paralegal",

"due\_in": "PT4H",

"automations": [

{

"type": "conditional\_route",

"condition": "existing\_trust==true",

"if\_true\_move": "schedule\_trust\_review",

"if\_false\_move": "planning\_session"

}

]

}

]

},

{

"stage\_key": "schedule\_trust\_review",

"name": "Schedule Trust Review Session",

"sla": "P2D",

"owner\_role": "Client\_Services",

"tasks": [

{

"task\_key": "book\_trust\_review",

"name": "Book trust review appointment",

"owner\_role": "Client\_Services",

"due\_in": "PT8H",

"dependencies": ["calendar\_sync"],

"automations": [{ "type": "attach\_checklist", "template\_id": "{{tmpl\_50\_point\_review\_id}}" }]

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "planning\_session" }]

},

{

"stage\_key": "planning\_session",

"name": "Life & Legacy Planning Session",

"sla": "P5D",

"owner\_role": "Attorney",

"tasks": [

{

"task\_key": "conduct\_session",

"name": "Conduct planning session & capture selections",

"owner\_role": "Attorney",

"due\_in": "P2D",

"checklist": [

"Confirm scope & baseline plan",

"Present pricing matrix",

"Capture add-on selections with line items"

],

"automations": [{ "type": "save\_recommendations\_to\_matter" }]

}

],

"outcomes": [

{ "label": "Selections Confirmed", "next": "engagement\_esign" },

{ "label": "Follow-up Needed", "next": "followup\_task" }

]

},

{

"stage\_key": "followup\_task",

"name": "Follow-Up Scheduling",

"sla": "P3D",

"owner\_role": "Client\_Services",

"tasks": [

{

"task\_key": "schedule\_followup\_session",

"name": "Schedule follow-up to finalize selections",

"owner\_role": "Client\_Services",

"due\_in": "PT24H"

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "engagement\_esign" }]

},

{

"stage\_key": "engagement\_esign",

"name": "Engagement Letter & eSign",

"sla": "P2D",

"owner\_role": "Paralegal",

"tasks": [

{

"task\_key": "generate\_engagement",

"name": "Generate engagement letter (merge)",

"owner\_role": "Paralegal",

"due\_in": "PT8H",

"templates": { "document": "{{doc\_engagement\_template\_id}}" },

"automations": [{ "type": "send\_esign" }]

},

{

"task\_key": "collect\_initial\_payment",

"name": "Collect initial payment",

"owner\_role": "Billing\_Specialist",

"due\_in": "PT8H",

"dependencies": ["payments\_enabled"],

"automations": [{ "type": "create\_invoice", "line\_items\_from": "selections" }]

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "drafting\_queue" }]

},

{

"stage\_key": "drafting\_queue",

"name": "Drafting Queue",

"sla": "P3D",

"owner\_role": "Paralegal",

"tasks": [

{

"task\_key": "assign\_drafter",

"name": "Assign drafter & SLA",

"owner\_role": "Paralegal",

"due\_in": "PT4H",

"automations": [{ "type": "spawn\_task\_pack", "pack\_id": "trust\_drafting\_pack\_v1" }]

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "document\_generation" }]

},

{

"stage\_key": "document\_generation",

"name": "Document Generation",

"sla": "P5D",

"owner\_role": "Drafter",

"tasks": [

{

"task\_key": "generate\_core\_docs",

"name": "Generate core docs (Trust, Will, POA, AHCD, HIPAA)",

"owner\_role": "Drafter",

"due\_in": "P3D",

"templates": { "bundle": "{{doc\_bundle\_core\_trust\_v1}}" }

},

{

"task\_key": "attach\_addon\_docs",

"name": "Attach add-on doc templates",

"owner\_role": "Drafter",

"due\_in": "P2D",

"automations": [{ "type": "include\_docs\_from\_addons", "source": "selections" }]

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "review\_session" }]

},

{

"stage\_key": "review\_session",

"name": "Review Session",

"sla": "P5D",

"owner\_role": "Attorney",

"tasks": [

{

"task\_key": "hold\_review\_meeting",

"name": "Hold review meeting (capture redlines)",

"owner\_role": "Attorney",

"due\_in": "P2D",

"automations": [{ "type": "versioning\_enable\_redline\_diff" }]

}

],

"outcomes": [

{ "label": "Revisions Needed", "next": "revisions" },

{ "label": "Approved", "next": "execute\_notarize" }

]

},

{

"stage\_key": "revisions",

"name": "Revisions",

"sla": "P3D",

"owner\_role": "Drafter",

"tasks": [

{

"task\_key": "apply\_changes",

"name": "Apply requested changes & regenerate",

"owner\_role": "Drafter",

"due\_in": "P2D"

}

],

"on\_complete": [{ "action": "return\_to\_stage", "stage\_key": "review\_session" }]

},

{

"stage\_key": "execute\_notarize",

"name": "Execute, Notarize & Record",

"sla": "P7D",

"owner\_role": "Client\_Services",

"tasks": [

{

"task\_key": "signing\_coordination",

"name": "Coordinate signing & notary",

"owner\_role": "Client\_Services",

"due\_in": "P3D"

},

{

"task\_key": "record\_deeds",

"name": "Record deeds where required",

"owner\_role": "Paralegal",

"due\_in": "P5D",

"dependencies": ["county\_erecording"]

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "funding" }]

},

{

"stage\_key": "funding",

"name": "Funding",

"sla": "P14D",

"owner\_role": "Funding\_Coordinator",

"tasks": [

{

"task\_key": "issue\_funding\_checklist",

"name": "Issue funding checklist",

"owner\_role": "Funding\_Coordinator",

"due\_in": "PT8H",

"templates": { "file": "{{tmpl\_funding\_checklist\_id}}" }

},

{

"task\_key": "verify\_funding\_proofs",

"name": "Verify funding proofs (accounts, titles, beneficiaries)",

"owner\_role": "Funding\_Coordinator",

"due\_in": "P10D",

"automations": [{ "type": "reminders", "schedule": ["P3D", "P7D", "P12D"] }]

}

],

"outcomes": [

{ "label": "All Proofs Verified", "next": "maintenance\_enrollment" },

{ "label": "Items Outstanding", "next": "funding" }

]

},

{

"stage\_key": "maintenance\_enrollment",

"name": "Maintenance Enrollment & Handoff",

"sla": "P3D",

"owner\_role": "Client\_Services",

"tasks": [

{

"task\_key": "enroll\_maintenance",

"name": "Enroll client in maintenance plan",

"owner\_role": "Client\_Services",

"due\_in": "PT24H",

"automations": [{ "type": "create\_subscription", "plan\_from": "selections\_or\_default" }]

},

{

"task\_key": "create\_annual\_review\_matter",

"name": "Create Annual Review matter",

"owner\_role": "Client\_Services",

"due\_in": "PT24H",

"automations": [{ "type": "create\_child\_matter", "pipeline": "Annual Review" }]

}

],

"on\_complete": [

{ "action": "move\_to\_stage", "stage\_key": "close\_active\_matter" }

]

},

{

"stage\_key": "close\_active\_matter",

"name": "Close Active Matter → Maintain",

"sla": "PT24H",

"owner\_role": "Paralegal",

"tasks": [

{

"task\_key": "archive\_working\_matter",

"name": "Archive working matter; keep maintenance matter open",

"owner\_role": "Paralegal",

"due\_in": "PT8H"

}

],

"on\_complete": [{ "action": "close\_matter" }]

}

],

"product\_catalog": {

"base\_offering\_key": "life\_legacy\_base",

"add\_ons": [

{ "key": "spouse\_asset\_protection\_order", "label": "Spouse Asset Protection Order", "price": 0, "price\_varies": true },

{ "key": "kids\_asset\_protection\_orders", "label": "Kids Asset Protection Orders", "price": 0, "price\_varies": true },

{ "key": "kids\_protection\_plan", "label": "Kids Protection Plan", "price": 0, "price\_varies": true },

{ "key": "will\_redesign", "label": "Will Redesign", "price": 0, "price\_varies": true },

{ "key": "advanced\_healthcare\_directives", "label": "Advanced Healthcare Directives", "price": 0, "price\_varies": true }

]

},

"integrations": {

"calendar": "google\_or\_outlook",

"video": "zoom",

"esign": "native\_or\_docusign",

"payments": "lifted\_pay",

"accounting": "quickbooks\_optional",

"erecording": "county\_erecording\_optional"

}

}

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# **2) Wyoming Asset Protection Trust — JSON Task Packs**

****{

"workflow\_key": "wyoming\_apt\_v1",

"name": "Wyoming APT: Lead → Trust Created + Maintenance",

"pipeline": "Asset Protection",

"stages": [

{

"stage\_key": "lead\_captured",

"name": "Lead Captured",

"sla": "PT4H",

"owner\_role": "Intake\_Specialist",

"entry\_triggers": [

"lead\_form\_submitted",

"referral\_imported",

"phone\_intake\_logged"

],

"tasks": [

{

"task\_key": "source\_referrer\_verify",

"name": "Verify source/referrer & tag practice area",

"owner\_role": "Intake\_Specialist",

"due\_in": "PT2H",

"subtasks": [

"Set practice area = Asset Protection",

"Attach referral contact (if any)"

]

},

{

"task\_key": "create\_contact\_matter",

"name": "Create Contact & Matter with default APT folders",

"owner\_role": "Intake\_Specialist",

"due\_in": "PT2H"

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "conflict\_check" }]

},

{

"stage\_key": "conflict\_check",

"name": "Conflict Check",

"sla": "PT8H",

"owner\_role": "Conflicts\_Analyst",

"tasks": [

{

"task\_key": "conflict\_search",

"name": "Run conflict search across CRM",

"owner\_role": "Conflicts\_Analyst",

"due\_in": "PT4H"

}

],

"outcomes": [

{ "label": "Conflict Found", "next": "decline\_close" },

{ "label": "No Conflict", "next": "book\_paid\_appt" }

]

},

{

"stage\_key": "decline\_close",

"name": "Decline & Close (Conflict)",

"sla": "PT2H",

"owner\_role": "Intake\_Specialist",

"tasks": [

{

"task\_key": "send\_decline",

"name": "Send conflict decline notice",

"owner\_role": "Intake\_Specialist",

"due\_in": "PT1H",

"templates": { "email": "{{tmpl\_conflict\_decline\_email\_id}}" }

}

],

"on\_complete": [{ "action": "close\_matter" }]

},

{

"stage\_key": "book\_paid\_appt",

"name": "Book Paid Appointment ($350)",

"sla": "P2D",

"owner\_role": "Intake\_Specialist",

"tasks": [

{

"task\_key": "send\_appt\_link",

"name": "Send scheduling link with $350 payment",

"owner\_role": "Intake\_Specialist",

"due\_in": "PT4H",

"dependencies": ["calendar\_sync", "payments\_enabled"],

"automations": [

{ "type": "payment\_required\_booking", "amount": 350, "currency": "USD" },

{ "type": "create\_zoom\_meeting\_on\_book", "account": "{{zoom\_acct\_id}}" }

]

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "issue\_apt\_intake" }]

},

{

"stage\_key": "issue\_apt\_intake",

"name": "Issue APT Intake + Questionnaire",

"sla": "PT12H",

"owner\_role": "Client\_Services",

"tasks": [

{

"task\_key": "send\_apt\_questionnaire",

"name": "Send APT intake questionnaire",

"owner\_role": "Client\_Services",

"due\_in": "PT6H",

"forms": [

{ "label": "APT\_Questionnaire", "url": "https://docs.google.com/document/d/1cxYHvSLkXovItChqZnfxIca1BEFGao-7/edit?usp=sharing" }

],

"automations": [

{ "type": "portal\_invite" },

{ "type": "reminder\_sms\_email", "schedule": ["P0DT1H", "P1D", "PT4H\_before\_appt"] }

]

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "intake\_mapping" }]

},

{

"stage\_key": "intake\_mapping",

"name": "Intake Complete & Field Mapping",

"sla": "PT8H",

"owner\_role": "Data\_Specialist",

"tasks": [

{

"task\_key": "compile\_intake",

"name": "Compile APT intake PDF & raw data",

"owner\_role": "Data\_Specialist",

"due\_in": "PT4H",

"automations": [

{ "type": "generate\_compiled\_pdf", "filename": "APT\_Intake\_Package.pdf" },

{ "type": "store\_raw\_payload", "format": "JSON,CSV" }

]

},

{

"task\_key": "map\_fields",

"name": "Map fields → Contact & Matter custom fields",

"owner\_role": "Data\_Specialist",

"due\_in": "PT4H",

"dependencies": ["field\_mapper\_config"]

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "apt\_strategy\_session" }]

},

{

"stage\_key": "apt\_strategy\_session",

"name": "APT Strategy Appointment",

"sla": "P3D",

"owner\_role": "Attorney",

"tasks": [

{

"task\_key": "hold\_session",

"name": "Hold APT strategy session",

"owner\_role": "Attorney",

"due\_in": "P2D",

"checklist": [

"Asset map & exposure",

"Trustee/protector choices",

"Banking/EIN/funding plan",

"Charging order protection"

]

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "engagement\_esign\_payment" }]

},

{

"stage\_key": "engagement\_esign\_payment",

"name": "Engagement + eSign + Initial Payment",

"sla": "P2D",

"owner\_role": "Paralegal",

"tasks": [

{

"task\_key": "generate\_engagement",

"name": "Generate engagement letter (APT)",

"owner\_role": "Paralegal",

"due\_in": "PT8H",

"templates": { "document": "{{doc\_apt\_engagement\_template\_id}}" },

"automations": [{ "type": "send\_esign" }]

},

{

"task\_key": "collect\_initial\_payment",

"name": "Collect initial payment/retainer",

"owner\_role": "Billing\_Specialist",

"due\_in": "PT8H",

"automations": [{ "type": "create\_invoice", "line\_items": ["APT Base", "Ancillary Docs as needed"] }]

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "drafting\_queue" }]

},

{

"stage\_key": "drafting\_queue",

"name": "APT Drafting Queue",

"sla": "P3D",

"owner\_role": "Paralegal",

"tasks": [

{

"task\_key": "assign\_drafter",

"name": "Assign drafter & SLA",

"owner\_role": "Paralegal",

"due\_in": "PT4H",

"automations": [{ "type": "spawn\_task\_pack", "pack\_id": "apt\_drafting\_pack\_v1" }]

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "doc\_generation" }]

},

{

"stage\_key": "doc\_generation",

"name": "WY APT Document Generation",

"sla": "P5D",

"owner\_role": "Drafter",

"tasks": [

{

"task\_key": "generate\_apt\_docs",

"name": "Generate Wyoming APT core docs",

"owner\_role": "Drafter",

"due\_in": "P3D",

"templates": { "bundle": "{{doc\_bundle\_wy\_apt\_core\_v1}}" },

"notes": "Include schedules A/B, assignments, letters of wishes if applicable"

},

{

"task\_key": "ancillary\_docs",

"name": "Prepare ancillary docs: trustees, banking, EIN, funding instructions",

"owner\_role": "Drafter",

"due\_in": "P2D"

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "review\_session" }]

},

{

"stage\_key": "review\_session",

"name": "Review Session",

"sla": "P5D",

"owner\_role": "Attorney",

"tasks": [

{

"task\_key": "hold\_review",

"name": "Hold review meeting (capture redlines)",

"owner\_role": "Attorney",

"due\_in": "P2D",

"automations": [{ "type": "versioning\_enable\_redline\_diff" }]

}

],

"outcomes": [

{ "label": "Revisions Needed", "next": "revisions" },

{ "label": "Approved", "next": "execute\_notarize" }

]

},

{

"stage\_key": "revisions",

"name": "Revisions",

"sla": "P3D",

"owner\_role": "Drafter",

"tasks": [

{

"task\_key": "apply\_redlines",

"name": "Apply changes & regenerate docs",

"owner\_role": "Drafter",

"due\_in": "P2D"

}

],

"on\_complete": [{ "action": "return\_to\_stage", "stage\_key": "review\_session" }]

},

{

"stage\_key": "execute\_notarize",

"name": "Execute & Notarize",

"sla": "P7D",

"owner\_role": "Client\_Services",

"tasks": [

{

"task\_key": "signing\_notary",

"name": "Coordinate signing & notary",

"owner\_role": "Client\_Services",

"due\_in": "P3D"

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "funding\_titling" }]

},

{

"stage\_key": "funding\_titling",

"name": "Trust Funding & Titling",

"sla": "P14D",

"owner\_role": "Funding\_Coordinator",

"tasks": [

{

"task\_key": "funding\_instructions",

"name": "Issue funding instructions",

"owner\_role": "Funding\_Coordinator",

"due\_in": "PT8H"

},

{

"task\_key": "collect\_proofs",

"name": "Collect proofs of funding & retitle",

"owner\_role": "Funding\_Coordinator",

"due\_in": "P10D",

"automations": [{ "type": "reminders", "schedule": ["P3D", "P7D", "P12D"] }]

}

],

"outcomes": [

{ "label": "Funding Verified", "next": "maintenance\_enrollment" },

{ "label": "Outstanding Items", "next": "funding\_titling" }

]

},

{

"stage\_key": "maintenance\_enrollment",

"name": "Maintenance Enrollment & Handoff",

"sla": "P3D",

"owner\_role": "Client\_Services",

"tasks": [

{

"task\_key": "enroll\_maintenance",

"name": "Enroll client in maintenance plan",

"owner\_role": "Client\_Services",

"due\_in": "PT24H",

"automations": [{ "type": "create\_subscription", "plan\_key": "apt\_annual\_maintenance" }]

},

{

"task\_key": "create\_annual\_review\_matter",

"name": "Create Annual Review matter",

"owner\_role": "Client\_Services",

"due\_in": "PT24H",

"automations": [{ "type": "create\_child\_matter", "pipeline": "Annual Review" }]

}

],

"on\_complete": [{ "action": "move\_to\_stage", "stage\_key": "close\_active\_matter" }]

},

{

"stage\_key": "close\_active\_matter",

"name": "Close Active Matter → Maintain",

"sla": "PT24H",

"owner\_role": "Paralegal",

"tasks": [

{

"task\_key": "archive",

"name": "Archive working matter; keep maintenance open",

"owner\_role": "Paralegal",

"due\_in": "PT8H"

}

],

"on\_complete": [{ "action": "close\_matter" }]

}

],

"integrations": {

"calendar": "google\_or\_outlook",

"video": "zoom",

"esign": "native\_or\_docusign",

"payments": "lifted\_pay",

"accounting": "quickbooks\_optional"

}

}

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## **Optional: Drafting Task Packs (referenced above)**

****[

{

"pack\_id": "trust\_drafting\_pack\_v1",

"name": "Estate Planning Drafting Pack",

"tasks": [

{ "name": "Assemble family & asset facts", "owner\_role": "Drafter", "due\_in": "PT8H" },

{ "name": "Generate core docs from template bundle", "owner\_role": "Drafter", "due\_in": "P2D" },

{ "name": "Attach add-on documents per selections", "owner\_role": "Drafter", "due\_in": "P1D" },

{ "name": "QA review & checklist complete", "owner\_role": "Paralegal", "due\_in": "PT8H" }

]

},

{

"pack\_id": "apt\_drafting\_pack\_v1",

"name": "APT Drafting Pack",

"tasks": [

{ "name": "Confirm trustees/protector/EIN details", "owner\_role": "Drafter", "due\_in": "PT8H" },

{ "name": "Generate WY APT core docs bundle", "owner\_role": "Drafter", "due\_in": "P2D" },

{ "name": "Prepare ancillary letters & funding instructions", "owner\_role": "Drafter", "due\_in": "P1D" },

{ "name": "QA review & finalize", "owner\_role": "Paralegal", "due\_in": "PT8H" }

]

}

]

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If you want these split into **separate files**, I can name them for your repo (e.g., workflow\_life\_legacy.json, workflow\_wy\_apt.json, taskpacks\_drafting.json).