

Harnessing Artificial Intelligence in Estate Planning:

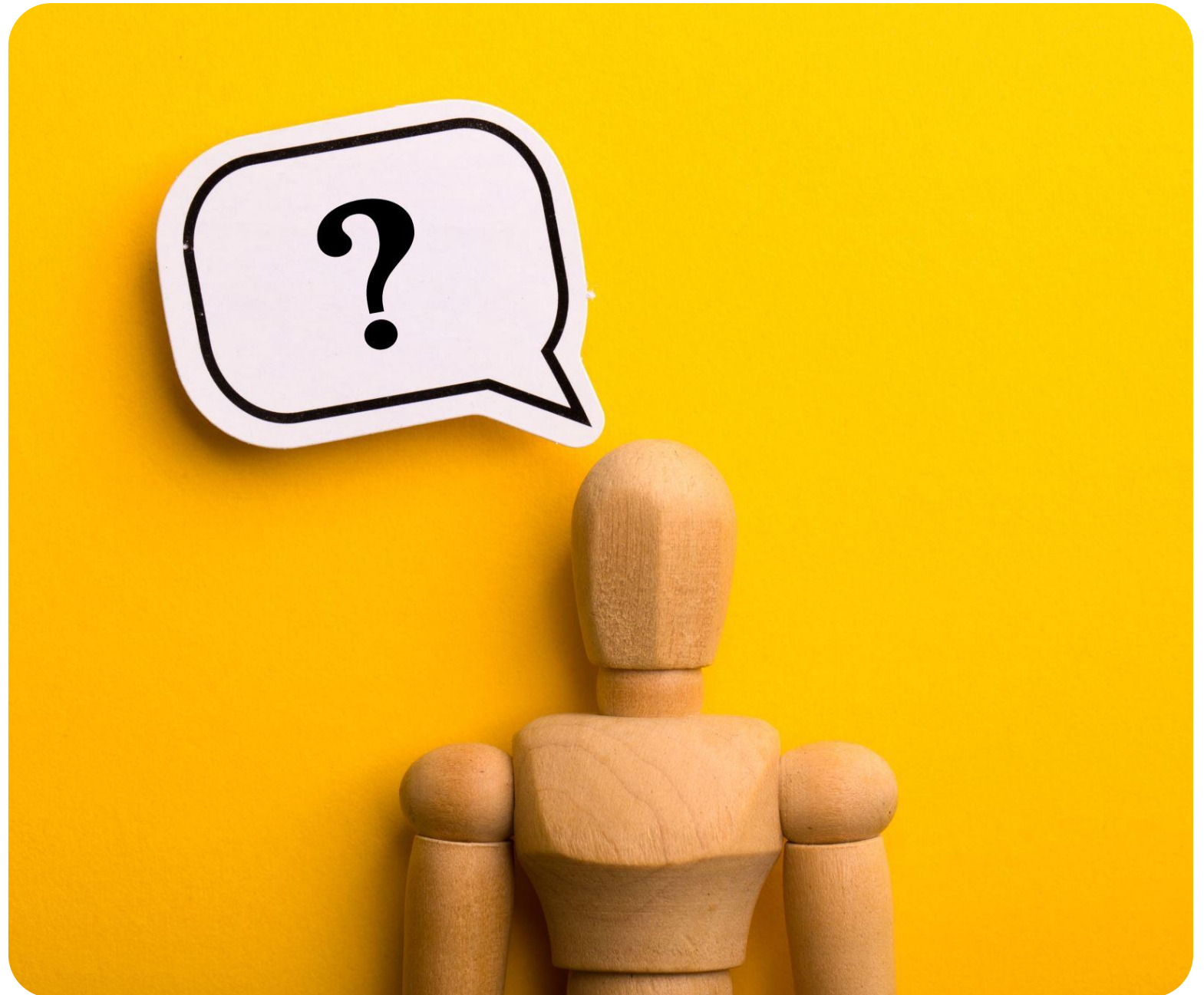
Strategies, Adoption, and Ethical Considerations

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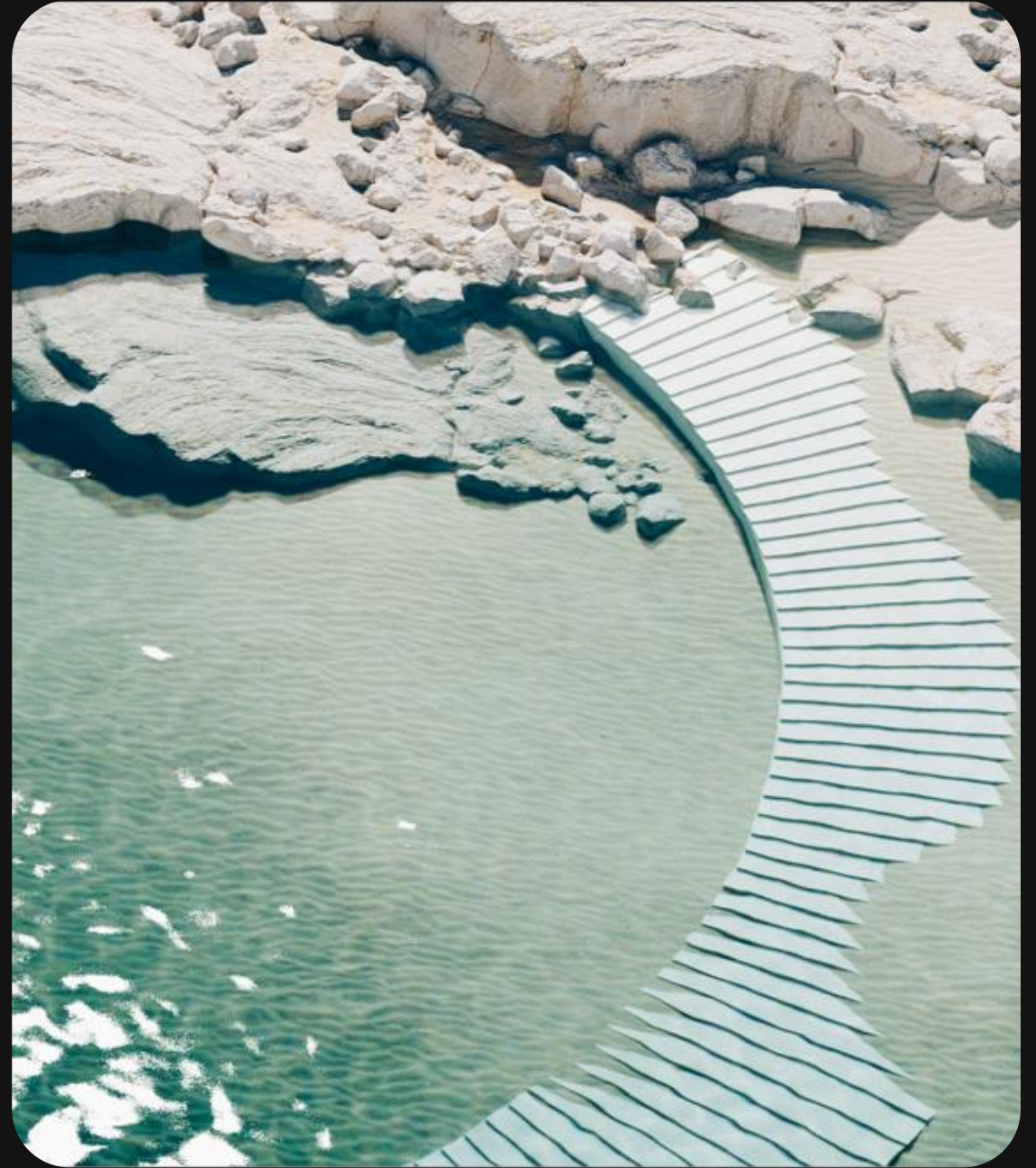
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How Are you
Using AI?

Which Ones?



What is AI?



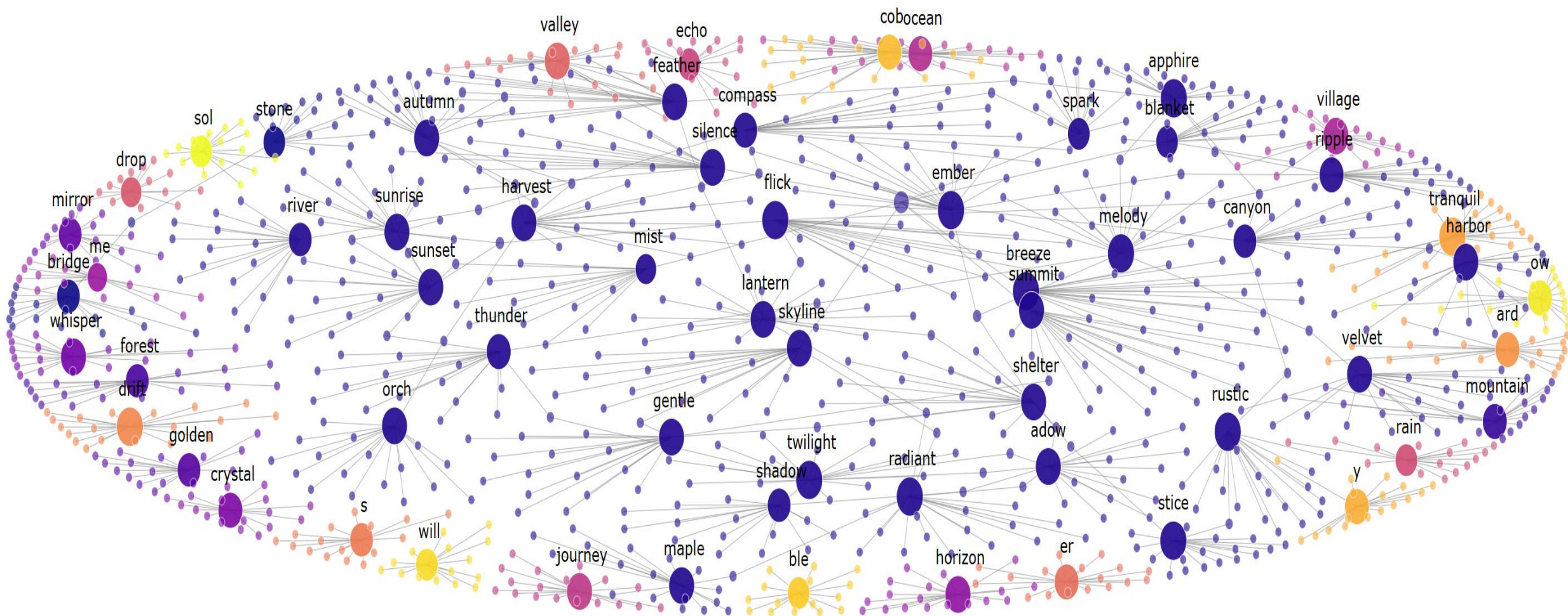
AI is a very complex prediction engine



Men and Women Kings and Queens



Embeddings



Common Myths About AI

AI Is Not Infallible

AI systems can make errors and require human oversight to ensure accuracy and fairness in decisions.

No Human-Like Consciousness

AI lacks true consciousness or emotions and operates based on algorithms and data patterns.

Setting Realistic Expectations

Understanding AI's limits helps professionals use these tools effectively and ethically in their work.



AI:
Optimistic
or
Pessimistic

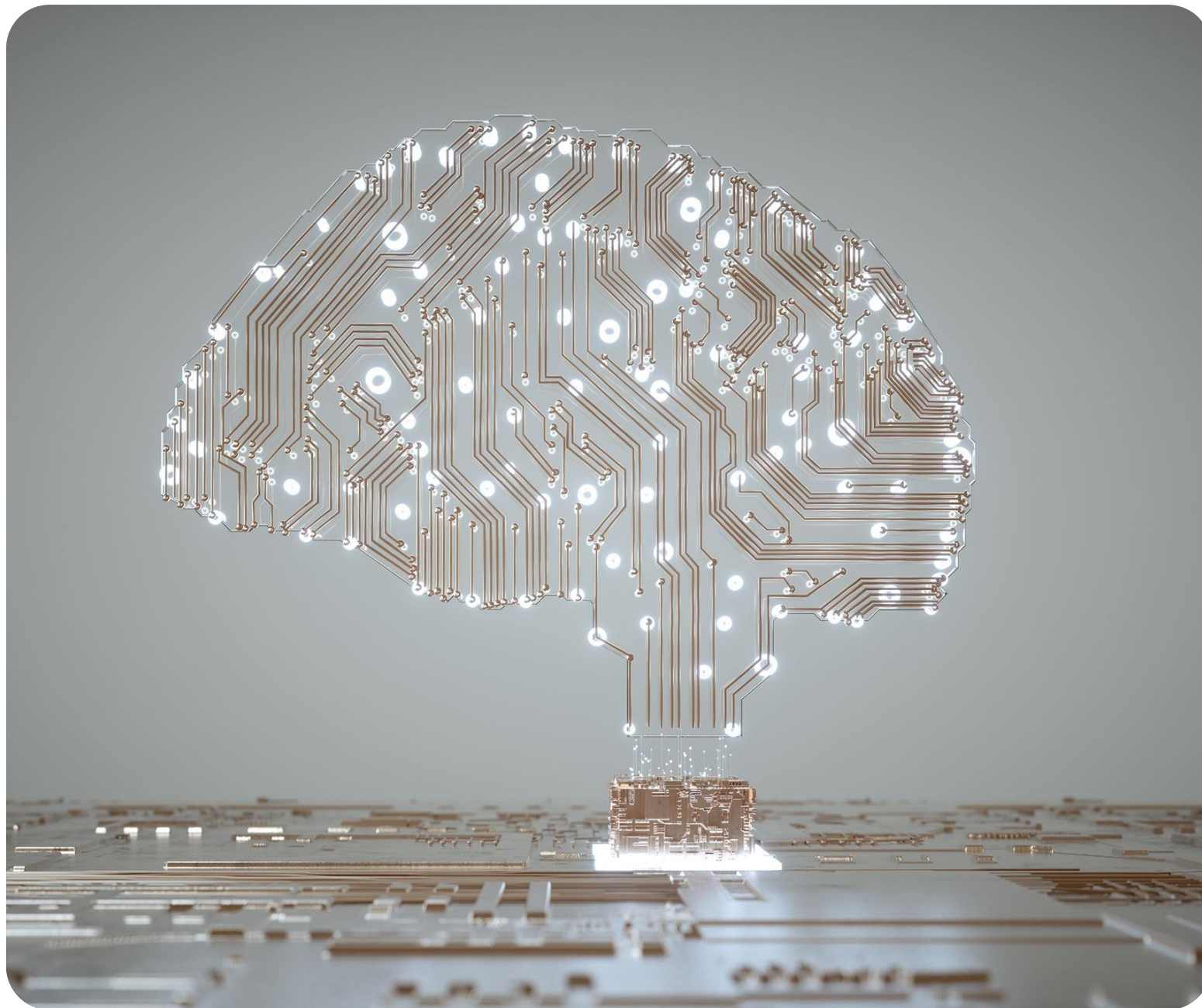
AI won't take your job.

Someone using AI will
take your job.

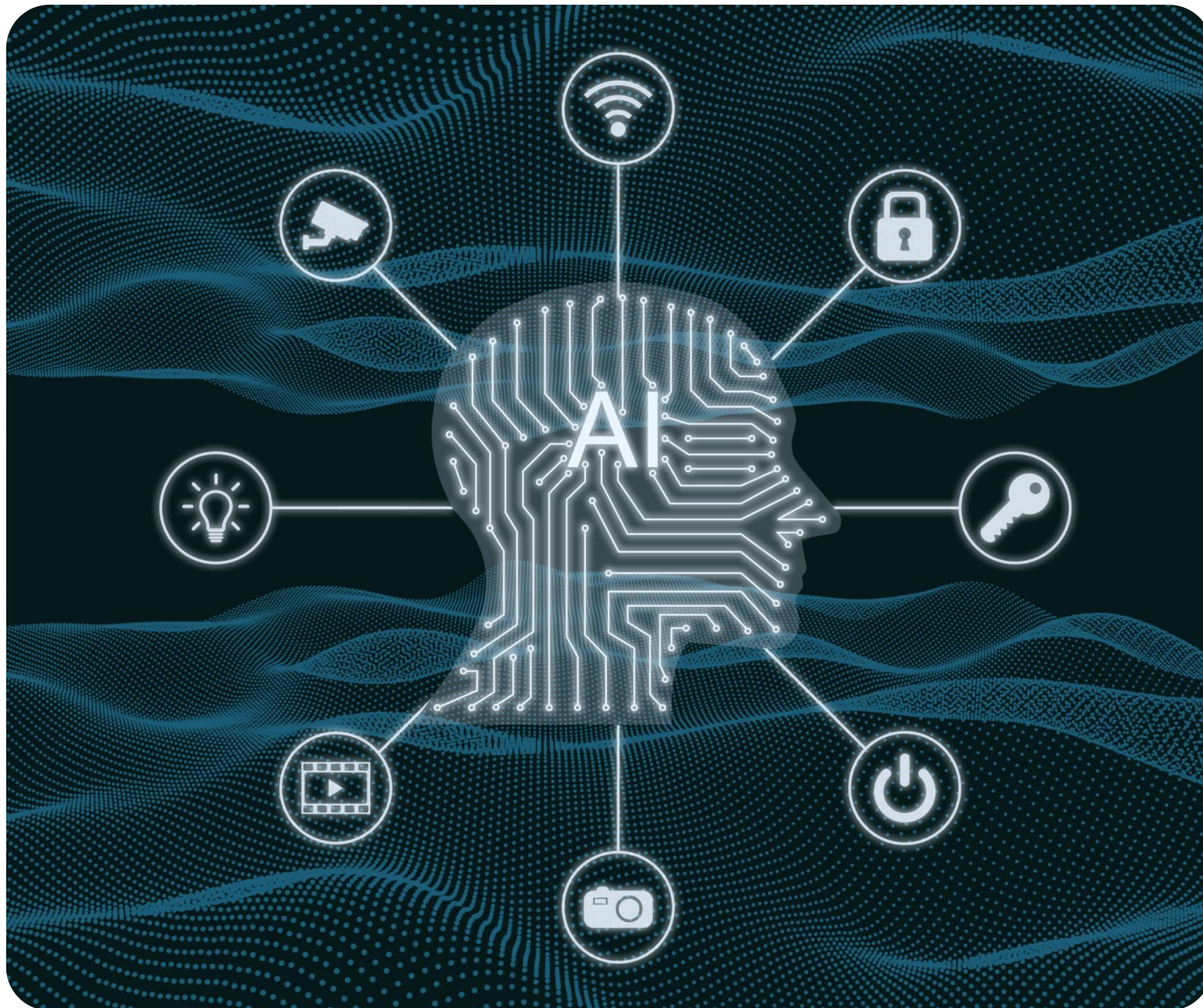


What are Your Concerns about AI?

How are you using AI for
your Work?



AI's role in
all fields is
expanding



Distinguishing AI, Machine Learning, and Related Technologies

Artificial Intelligence Overview

AI includes a broad range of technologies designed to simulate human intelligence in machines.

Machine Learning Focus

Machine learning involves training data-driven models to enable computers to learn from experience without explicit programming.

Natural Language Processing

Natural language processing allows machines to understand and interpret human language for tasks such as communication and analysis.

Assessing and Navigating AI Adoption in Estate Planning



Frameworks for Evaluating AI Readiness

Technological Capabilities

Assessing current technology infrastructure is crucial for successful AI integration in organizations.

Staff Skills Evaluation

Evaluating employees' AI-related skills ensures the team can effectively implement AI solutions.

Strategic Alignment

Aligning AI initiatives with organizational goals supports seamless adoption and maximum impact.

Phases of AI Adoption: Ignorance, Denial, Chat Adoption, Agent Adoption

Ignorance Phase

Initial stage where individuals or organizations are unaware of AI technologies and their potential benefits.

Denial Phase

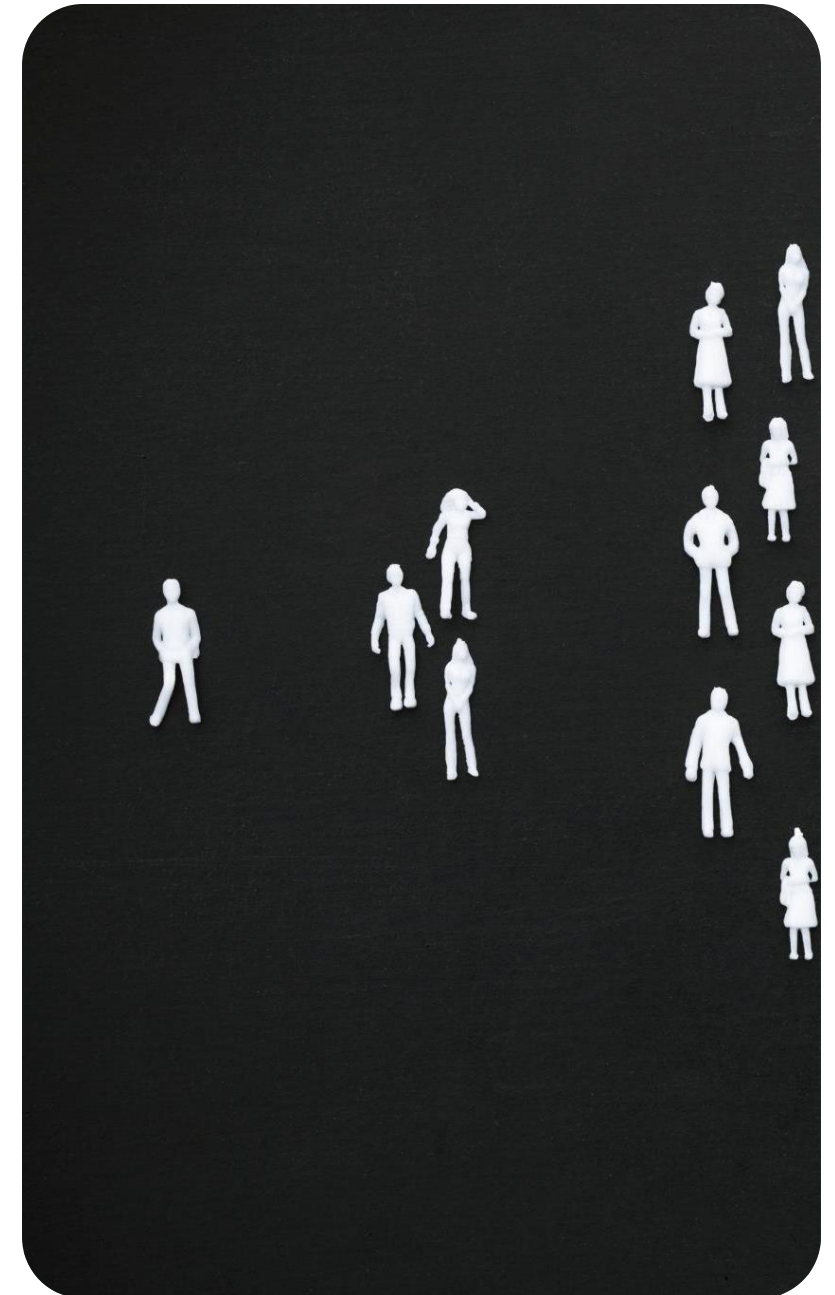
Phase characterized by resistance or skepticism towards AI adoption despite its growing presence.

Chat Adoption Phase

Adoption of conversational AI tools like chatbots to improve communication and operational efficiency.

Agent Adoption Phase

Full integration of autonomous AI agents that handle complex tasks and decision-making processes.



AI Adoption Challenges and Solutions in Professional Practices



Data Privacy Concerns

Data privacy is a major challenge when adopting AI in professional practices, especially regarding sensitive client information.

Resistance to Change

Resistance from professionals and clients can hinder AI adoption, requiring thoughtful change management and communication.

Technical Complexity

AI implementation involves complex technologies that require specialized knowledge and tailored solutions for estate planning.

Education and Ethical Guidelines

Education programs and ethical guidelines support responsible AI use and foster trust in professional environments.

The Impact and Relevance of AI in Estate Planning

Why AI Is Transforming Estate Planning



Automation of Complex Calculations

AI handles intricate calculations quickly and accurately, reducing errors in estate planning processes.

Predictive Outcome Analysis

AI predicts various estate planning outcomes, helping planners make better-informed decisions.

Streamlined Document Preparation

AI automates the creation and management of estate documents, saving time and effort.

Enhanced Advisory Focus

By automating routine tasks, AI allows estate planners to concentrate on client relationships and strategic advice.

Extending the LLM

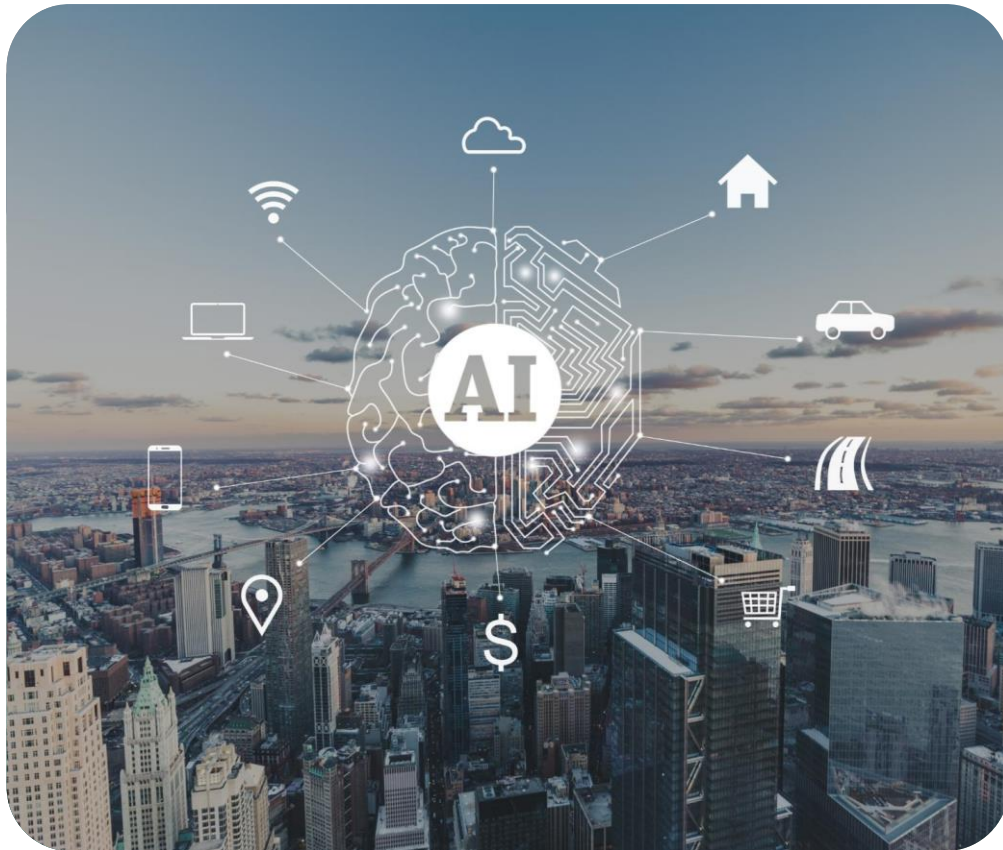
Search the Web

Search your Data

Take Action on Your Behalf

What is AI good at?

Practical AI Use Cases in Estate Planning



Intelligent Document Drafting

AI automates estate planning document drafting, improving efficiency and reducing errors significantly.

Risk Assessment

AI analyzes risks in estate plans, helping identify potential issues and enhance plan robustness.

Client Query Handling

AI-powered systems manage client queries promptly, enhancing communication and client satisfaction.

Scenario Modeling

AI simulates various estate planning scenarios to support accurate decision-making and strategic planning.

Getting the most from AI



Prompts

Start saving your prompts. Look for prompts from others. Have AI build prompts for you

Your Methodology and Values

Create a document that contains instructions to the LLM that talks about your approach to estate planning. This is your secret sauce.

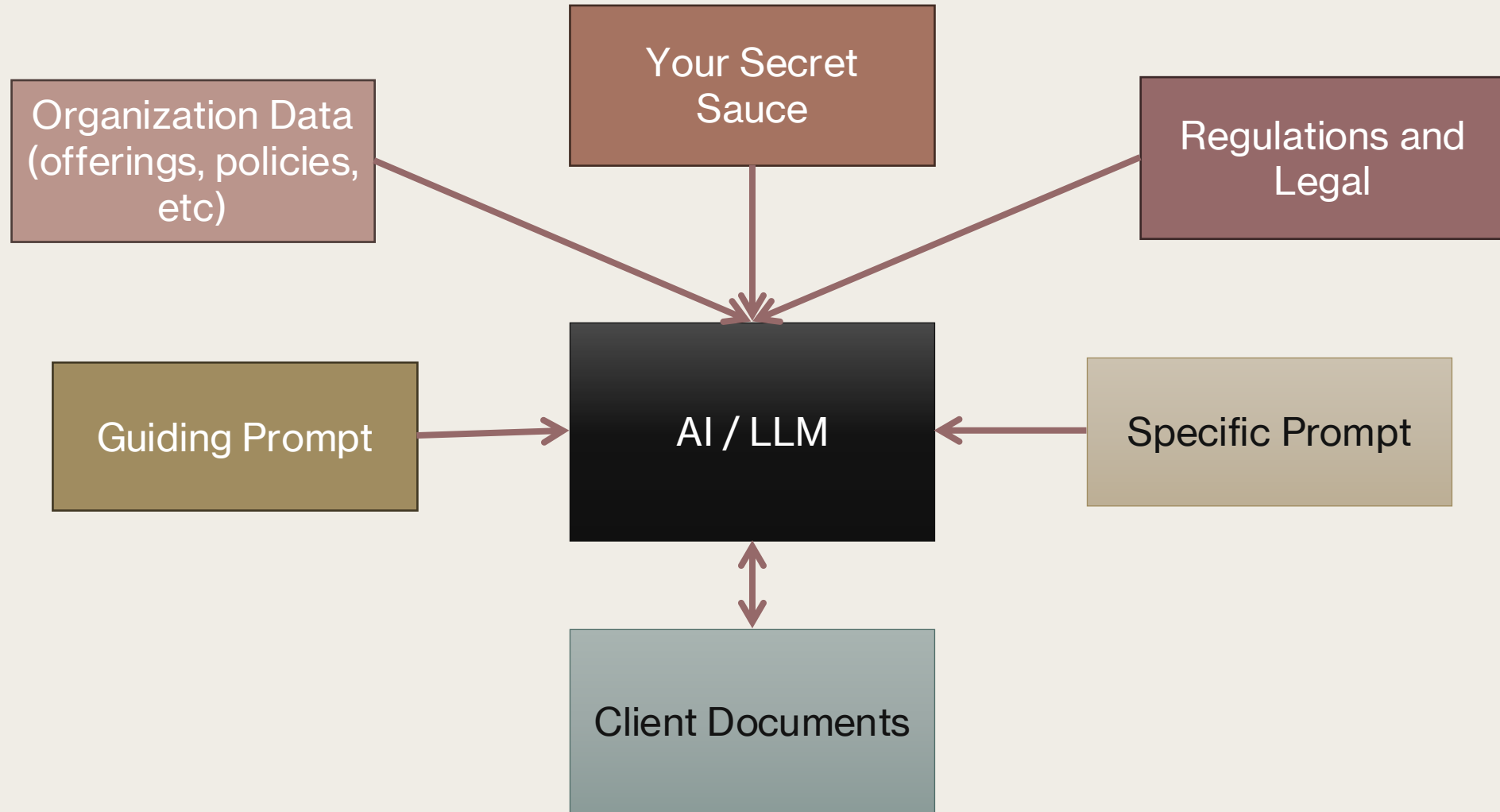
Business, Legal, and Regulatory Content

Links and content that inform the AI of your offerings, rules, and limitations.

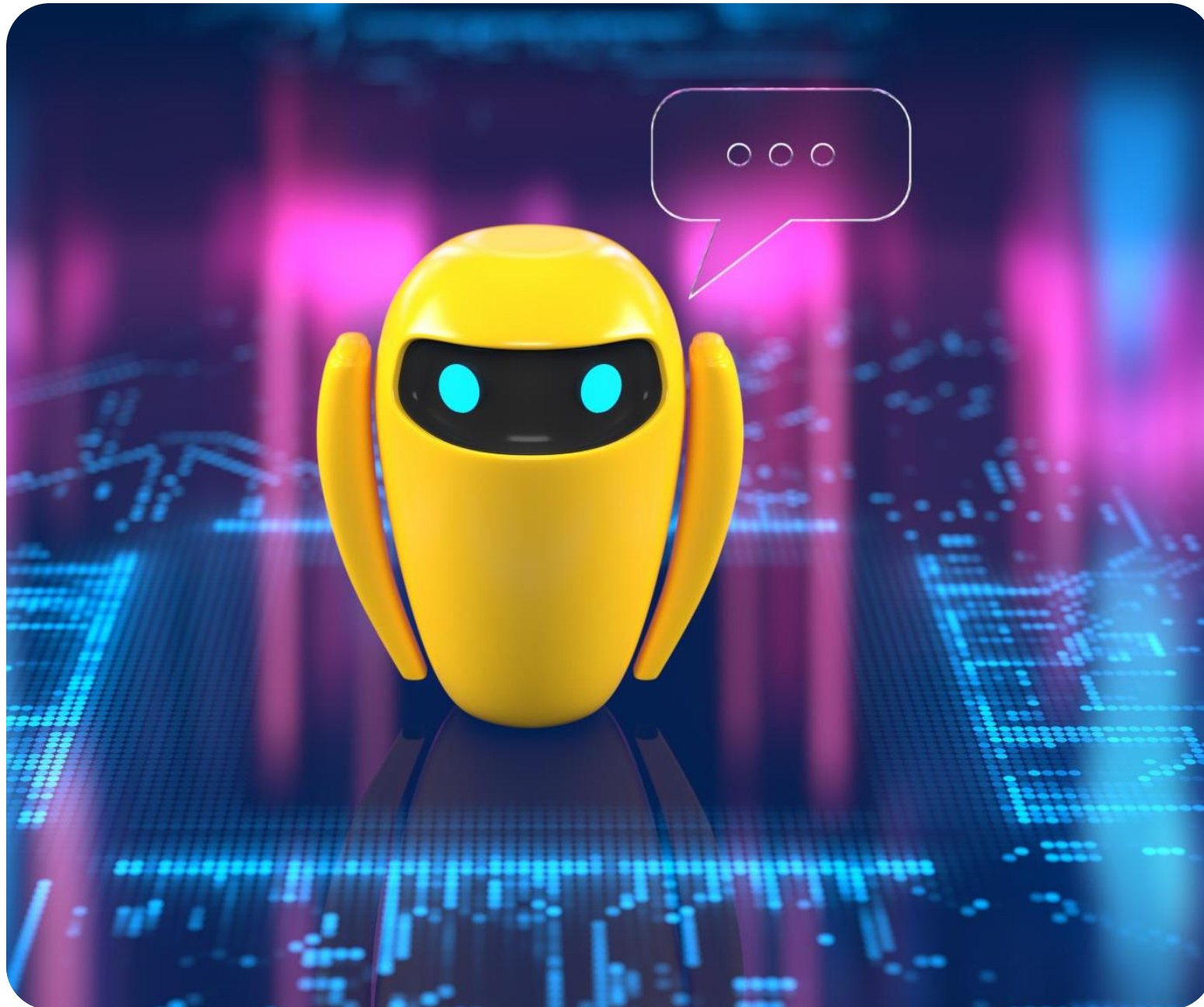
Client Specific Data

Data that will allow AI to work with data from your client. Trust, letters, intent, wills, etc.

Organizing Your Data



AI Strategies, Patterns, and Tools for Estate Planners



Basic Chat: Answering Simple Questions

Routine Inquiry Handling

Basic chatbots efficiently manage routine client questions, reducing workload for estate planners.

Focus on Complex Issues

Automation frees estate planners to dedicate time to more complex client matters and personalized planning.

Improved Responsiveness

Chatbots enhance response time and increase overall client satisfaction with timely support.



Advanced Chat: Supporting Complex Planning and Reasoning

Detailed Scenario Analysis

Advanced AI chats enable thorough analysis of multiple planning scenarios to guide decision-making effectively.

Enhanced Reasoning Capabilities

AI chat systems provide deep reasoning to uncover insights and evaluate complex estate planning strategies.

Optimized Planning Suggestions

The AI assists estate planners by recommending optimized strategies based on analyzed data and insights.



Agents and Tools: Managing Intent, Holding State, and Interfacing with External Resources

Contextual Awareness

AI agents maintain contextual awareness to understand and respond effectively to user intent over time.

Workflow Management

Agents manage complex workflows to streamline tasks and ensure efficient execution of plans.

Integration with External Systems

AI agents interface with external resources such as databases and legal systems to enhance decision-making.

Critical Tips

DO NOT put
client data into a
free AI

Proactively test
for bias

Always check the
output

DO NOT Fake It.
Give credit
appropriately

What is
tempting
about AI?



Practice
Thinking
Hard

Adapting with AI

Learning to use
a new tool is
hard work



If you are
not learning
more about
AI, you are
falling
behind



What
value can
only I
bring?

AI as a Partner



Can AI free me up to do specifically human things?

Can AI help with the task I am doing right now?

How can AI make me better at my job? Strengths and Weaknesses

What about Agents?

Should AI be doing this?

What is the unique
human value that you
bring to your world?

