THE OFFER

# Families research for weeks. *Be the firm that answers.*

Estate clients rarely call in a rush. They read, compare firms, and ask ChatGPT what a trust costs before they ever pick up the phone.

**The agent answers in English and Spanish, gathers family, property, and document details with care, asks the questions that sort planning, probate, and guardianship matters, and books the consultation. It never recommends a will or trust or gives legal advice.**

ANSWER

### A bilingual front door, 24/7

Voice, text, and web chat, answered in English and Spanish with a target of under a minute. Callers in other languages go to a person or a scheduled callback.

SORT

### Every inquiry by matter type and urgency

Wills, revocable and living trusts, homestead and real property, probate administration, guardianship, and estate and trust disputes. Urgent calls transfer live to the attorney on call, with a text alert if nobody picks up.

BOOK

### Consults booked, conflicts checked

Collects every party name for your conflict check before any details, books the consultation, and runs reminders and reschedules.

BE FOUND

### Named when clients ask AI

English and Spanish estate planning & probate pages that answer real questions, plus LegalService and Person schema for each attorney, so ChatGPT and Google can find and cite your firm by name.

## The guardrails

- **No planning advice.** The agent never recommends a will over a trust or says what a family should do.
- **Conflicts before details.** Estate matters often involve several relatives.
- **Account details stay out of chat.** Intake asks only for the kinds of assets, never for account numbers, balances, or passwords.
- **Deadlines flagged, not judged.** Probate runs on deadlines, such as the creditor claim period after notice is published (Fla. Stat. § 733.702).
- **Clearly a law firm.** The agent says it is an assistant, never an attorney.

## How it works

1 FREE
**Bar Compliance and AEO Audit.** Rule-labeled gaps on your current site.

2 $1,997 · TWO DAYS PLUS ONLINE
**Growth Systems Intensive.** Booking, missed-call text-back, 7-day bilingual follow-up, FAQ chat. Credits in full toward Implementation within 60 days.

3 FROM $4,997 · 90 DAYS
**Implementation.** The bilingual voice and messaging agent, planning and probate intake paths, name capture for your conflict check, texted checklists with secure upload links, and Spanish practice-area pages built for AI search.

4 FROM $649 / MONTH
**Care.** The Practice seat, with 5,000 texts and 150 voice minutes a month. Optional hours cover call review.

NEXT STEP

### A 30-minute intake review

We walk through how inquiries reach your firm today, where they leak, and what the agent would handle. Founder-led by **Brandon Aday**.

305-209-8453
Se habla español
adayinteractive.com/estate-law-ai-miami

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