How Advisors Can Use Trust & Will’s AI Assistant & Document Extraction Features to Better Serve Clients

Trust & Will introduces AI-powered document extraction and assistant tools within EstateOS for Advisors.

CORONA, CA, UNITED STATES, February 19, 2026 /EINPresswire.com/ -- Estate planning doesn’t stop once documents are signed; it’s an ongoing process. With Trust & Will’s new AI assistant and document extraction tools, that process just got a whole lot easier for advisors and their teams.

These tools are designed to give advisors quick, direct access to the documents that matter most—especially Revocable Living Trusts—making it easier to spot gaps, initiate meaningful conversations, and stay proactively engaged with clients over time.

AI Assistant & Document Extraction: How Do They Work?

These new tools flip the script, and they’re simple by design:

The AI assistant lives right in your advisor portal as a built-in chat feature, giving you instant answers about client details, estate planning concepts, or even tips on how to use the EstateOS for Advisors platform.

The document extraction tool reads uploaded estate planning documents in an instant (including wills, trusts, power of attorney documents), and produces a detailed summary with key highlights. This can save you hours in time spent on manual reviews.

The Value of These Tools for Advisors

Let's be honest: estate planning documents often get "filed and forgotten." But that mindset can leave clients exposed, especially as their lives evolve.

With these Trust & Will features, advisors can now:

Instantly confirm if a client has a trust on file

See when it was created

Identify whether it's time for a review or update

That's a huge value add; not just for compliance, but for deepening client trust. We're not just helping clients create a plan, we're showing them we're looking out for them long after the ink dries.

As I like to say: "Even if a Living Trust is five years old, clients tend to think they're good. But life changes—and this lets us do a quick pulse check to see if it still fits."

How to Leverage These Tools in Your Day-to-Day

The tools aren't just powerful, they're simple to use. Here's how I see them fitting into everyday advisor workflows:

Quick Trust Reviews

Pull up trust details at a glance. No digging, no delays. If it's been a few years, that's your signal to check in.

Re-Engage Dormant Clients

Use trust data to reconnect. If a client hasn't made changes in years, you have a natural reason to reach out and offer support.

Integrated Planning Conversations

Use trust insights to transition into broader financial or legacy planning discussions. It's a natural bridge into reviewing life insurance, retirement goals, or real estate assets.

Practical Tips From the Field

I've already started using these tools, and here's what I'd tell other advisors:

Review with every client: Make trust document checks part of your routine. It's a fast way to show value and stay connected.

Remind clients how hard the process used to be: Most clients remember how overwhelming it felt the first time they created a trust. Now, we get to say: “It doesn’t have to be that hard again.”

Use it as an introduction to the Trust & Will platform, EstateOS: The interface is clean, the process is intuitive, and clients walk away feeling empowered. It helps reframe estate planning as something ongoing—not one-and-done.

Bottom Line: More Than a Tech Upgrade
To me, this isn’t just about new features. It’s about creating new opportunities.

These tools give us more ways to show up for our clients: more reasons to check in, more chances to provide real, actionable advice. That builds trust. And that’s how you grow long-term relationships.

So yes, these features make our jobs easier. But more importantly, they help us become better advisors.

“Now you get to show off Trust & Will,” I said it before, and I’ll say it again. Because when it’s this easy to review, update, and protect a client’s legacy…why wouldn’t you?

About the Author

Suthipong “Bob” Chitrathorn is a financial advisor with over 21 years of experience, guiding clients toward their financial goals with expertise and care. Bob’s passion for personal finance began while helping his own parents navigate financial decisions.

Partner with Trust & Will

Interested in partnering with Trust & Will to enhance your own clients’ estate planning needs? Learn more about how you can join over 17,000 financial advisors and firms who are delivering peace of mind to their clients by offering a comprehensive estate planning solution. Schedule a free demo today.

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