

Ten Tools Every Lawyer Should Start Using Tomorrow

The prompts, checklist and safety steps from Rachel Huff's talk, ready to copy.

Role

Task

Context

Format

What's missing

[Start here](#)

The Go-To Prompt

Every tool in this guide uses the same five parts. Learn them once, and each new job is just a change to one part. The highlighted part on each tool page is the one that changed.

Role	Task	Context	Format	What's missing
Who the AI is. "A special needs planning attorney in Ohio."	The one job. "Draft a reply."	The facts, with names swapped for placeholders.	Length, tone, reading level, layout.	"Ask me anything you need before you start."

The same request, asked two ways

Weak	Strong										
"Write an email to a client about their special needs trust." This comes back generic, and the AI guesses at the facts.	<table><tr><td>Role</td><td>You are a special needs planning attorney in [state].</td></tr><tr><td>Task</td><td>Draft a reply to a parent asking what her son's trust can pay for.</td></tr><tr><td>Context</td><td>[Paste her email with names removed.]</td></tr><tr><td>Format</td><td>Warm, plain English, under 150 words.</td></tr><tr><td>What's missing</td><td>Before you draft, ask me anything you need.</td></tr></table>	Role	You are a special needs planning attorney in [state].	Task	Draft a reply to a parent asking what her son's trust can pay for.	Context	[Paste her email with names removed.]	Format	Warm, plain English, under 150 words.	What's missing	Before you draft, ask me anything you need.
Role	You are a special needs planning attorney in [state].										
Task	Draft a reply to a parent asking what her son's trust can pay for.										
Context	[Paste her email with names removed.]										
Format	Warm, plain English, under 150 words.										
What's missing	Before you draft, ask me anything you need.										

Blank template to copy

Role: You are [who the AI is, for example a special needs planning attorney in your state].

Task: [The one job, for example draft a reply.]

Context: [The facts, with names swapped for placeholders.]

Format: [Length, tone, reading level, layout.]

What's missing: Ask me anything you need before you start.

Your plan decides who sees your data

Personal plans

Claude Free, Pro, Max
ChatGPT Free, Plus

Can train on your chats unless you turn the setting off.

Business plans

Claude Team, Enterprise
ChatGPT Business, Enterprise

Not used to train models by default.

United States v. Heppner (S.D.N.Y., Feb. 10, 2026): about 31 documents a defendant made with consumer Claude were held not privileged and not work product. The privilege conclusions for your practice are yours to draw.

On a personal plan? Turn training off today

Claude Settings, then Privacy. Turn off “Help improve our AI models.”

ChatGPT Settings, then Data Controls. Turn off “Improve the model for everyone.”

Three rules for every tool in this guide

1. **Swap real details for placeholders.** No names, SSNs, Medicaid IDs, diagnoses or benefit award letters in a personal-plan tool. Special needs files hold more of these than most practices.
2. **Review every answer like a first-year associate's draft.** AI can sound sure and still be wrong. The look-back example on page 6 shows how.
3. **Write a one-page AI policy.** Which tools, what data goes in, who reviews what comes out.

Further reading: ABA Formal Opinion 512 (July 29, 2024).

Write

1 Write Draft a client email in your voice

Role	You are a special needs planning attorney in [state].
Task	Draft a reply to this parent.
Context	[Her email asking whether the trust can pay for a laptop and summer camp.]
Format	Warm, under 150 words.
What's missing	Ask me what you need first.

You check

Every statement about what the trust can and can't pay for.

You need

The business AI plan: Claude Team or ChatGPT Business.

2 Write A firm assistant that knows your style

Role	You are our firm's drafting assistant. Use our tone guide and approved FAQ answers (uploaded).
Task	Draft replies staff can send after review.
Format	Our voice, our sign-off.

Save this once as a Project and every staff member's draft starts from the firm's voice.

You check

That staff drafts still go through review before they send.

You need

The same plan. Projects are included.

Already doing this? Add your best past letters as examples, so drafts start from your own work.

Write

3

Write

Meeting notes to follow-up

Role	You are a special needs planning attorney in [state].
Task	Turn these meeting notes into a summary, a to-do list by person and a recap email to the family.
Context	[Your typed notes, or a transcript from your notetaker, with names swapped for placeholders.]
What's missing	Ask me what you need first.

In the talk, the recap email came back promising “We’ll set up an ABLE account for Mateo before the inheritance arrives.” Nobody had decided that. Read for promises before anything goes out.

You check

Anything the draft promises that you haven't decided.

You need

A notetaker: Granola (Business plan) or Zoom's built-in summaries in paid plans. Copilot in Teams is a paid add-on.

4

Write

Letters, seminar outlines, handouts and slides

Role	You are a special needs planning attorney.
Task	Write a one-page family handout: “What a trustee can and can’t do.”
Format	Headings, short bullets, 8th-grade reading level, no citations.
What's missing	Ask me which state first.

Ask for a family workshop outline the same way, then paste the outline into Gamma or Canva for a first-draft slide deck.

You check

Accuracy for your state before it goes to a single family.

You need

The same plan, plus Canva Pro or a paid Gamma plan.

Understand

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Understand

Plain English for every reader

Role	You are a special needs planning attorney in [state].
Task	Explain what this trust can pay for.
Context	[The trust's distribution terms, with names removed.]
Format	Write this for [reader] at a [grade] reading level.
What's missing	Ask me what you need first.

Run it three times and change only the Format line: once for the trustee, once for a parent, once for the beneficiary in plain language.

You check

You still read it before it goes to the family.

You need

The same plan.

5

Understand

The Medicaid look-back, with one added line

Without the Context line below, the draft in the talk made three mistakes a family member would have believed:

1. **36 months.** The look-back is 60 months for transfers.
2. **Gifts under the annual gift tax exclusion don't count.** The gift tax exclusion doesn't exempt anything from Medicaid's transfer rules.
3. **The penalty starts on the date of the gift.** It starts once the person is otherwise eligible and has applied.

Role	You are an elder law attorney.
Task	Explain the Medicaid look-back to a client's adult daughter.
Context	Use the federal rules in effect since the Deficit Reduction Act of 2005, and flag anything that varies by state.
Format	Plain English, 8th-grade reading level, under 130 words.
What's missing	Ask me which state first.

The added line won't catch everything every time, which is why you still read it, but it gets you a draft worth editing. Federal rule: 42 U.S.C. § 1396p(c). A few states run their own rules.

Understand

6

Understand

Summarize a long document

Role	You are reviewing a trust for a special needs planning attorney.
Task	List every distribution standard and the page it's on.
Context	[The trust, with names and numbers redacted, uploaded.]
Format	A table: standard, page, exact wording.

The page number is what makes checking fast. The same move works for a stack of care records.

You check

Open the cited page for every row before relying on it.

You need

Gemini Notebook (formerly NotebookLM), included in every Google Workspace plan. Or a Claude Project.

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Understand

Triage the inbox

Task	Summarize this thread with the care manager in three bullets, then draft a reply confirming Thursday's meeting.
Format	Short, friendly.

You check

Dates, names and anything that sounds like a promise.

You need

Gemini in Gmail comes with Google Workspace business plans. Copilot Chat in Outlook comes with most Microsoft 365 business plans.

Run the firm

8

Run the firm

Onboard staff from one recording

Task	Turn this into a numbered SOP a new hire can follow.
Context	[Transcript of you walking through the SNT funding checklist on screen.]
What's missing	Flag any step I skipped or explained unclearly.

Record it once while you do the work anyway. The last line catches the steps you do on autopilot.

You check

That every step matches how your office really does it.

You need

The same plan, plus any screen recorder (Zoom or Loom).

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Run the firm

Marketing, with you in charge

Task	Turn this into a blog post, a newsletter blurb and three social posts.
Context	[Transcript of your last family webinar.]
Format	Educational, no specific legal advice, end with an invitation to our next workshop.

You check

Your state's advertising rules, and that nothing reads as advice to a specific family.

You need

The same plan, plus Canva Pro for the graphics.

Run the firm

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Run the firm

An intake form that preps the consult for you

Task

Write a short summary of this intake form for my consult prep, then list any missing information.

Context

[The intake form answers, passed in by your automation.]

This is the AI step inside an automation: form submitted, summary and missing-info list written, prep task created in your system for you to review.

You check

The attorney still reviews, starting from a finished summary.

You need

A paid Zapier or Make plan (multi-step automations aren't on the free tier).

Already doing this? Add an AI step that sorts SNT funding from guardianship and stops when key facts are missing.

This week, try one job with the Go-To Prompt

1. **Pick the job** from these ten that takes up most of your week.
2. **Run the Go-To Prompt** with placeholders in place of client details.
3. **Change one part** and run it again. Save whichever version worked better.

About Rachel

Rachel Huff, J.D., is the founder and CEO of Cloud925, a legal technology consulting and coaching firm for solo attorneys and small firms. She grew up inside her mom's elder law and estate planning practice, where she helped implement its first case management system at age 12, and still serves as the firm's part-time CTO.

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Nothing in this guide is legal advice.
Cloud925 is not a law firm.