INTAKE-TEMPLATE

Sovereign Executive Agent — Discovery & Provisioning Packet

Prepared for: {{CLIENT_NAME}} · {{CLIENT_TITLE}}, {{CLIENT_COMPANY}}
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Date: {{DATE}}
Contract tier: {{TIER — Sovereign One / Sovereign Office / Sovereign Enterprise}}

What this is

A private, purpose-built AI executive assistant for you. It lives on your phone. It listens only when you say a codename you choose. It connects into your Microsoft 365 (or Google Workspace) to work your inbox, calendar, files, and contacts on your terms. It runs on infrastructure I operate directly — not on a shared consumer product. Your data does not train anyone's model.

This packet has two parts:

1. A ~15-minute questionnaire so I can configure the persona, voice, permissions, and priorities.
2. A short list of items your IT / EA needs to provision on the {{CLIENT_COMPANY}} side (mostly things you likely already have).

Return the completed packet to **kevan@ldrcllc.com**. Every setting here is negotiable and reversible — nothing is locked in until you confirm.

Part 1 — Persona & Voice · ~5 min

Q1. Codename / wake word. What single phrase would you like to say to activate the assistant? Ideal is 3–5 syllables with distinct sounds so it doesn't fire accidentally.
→ Your choice: _____

Q2. What should the assistant call itself? (Its name/identity when it responds.)
→ Name: _____

Q3. Voice. Pick one:
- [ ] Male
- [ ] Female
- [ ] Custom-cloned voice — whose? (Yours? An advisor's? Requires ~30 min of clean audio.) _____
- Accent preference: [ ] American [ ] British [ ] South Asian [ ] Neutral [ ] Other: _____

Q4. Personality. Pick 3–5 traits:
- [ ] Concise & direct
- [ ] Warm & personable
- [ ] Dry-witted
- [ ] Formal / boardroom
- [ ] Coaching (proactive, will push back)
- [ ] Deferential (waits to be asked)
- [ ] Aggressive follow-through
- [ ] Other: _____

Q5. Hard rules — never do / never say. Examples: never book anything before 7am; never mention deal names in front of others; never send email without my per-message approval; always ask before authorizing spend over $X; never contact these people: _____.
→ Your rules:
1.
2.
3.

Part 2 — Access & Authority · ~5 min

Q6. Primary tenant. What is your primary M365 or Google Workspace domain? (e.g., `{{CLIENT_DOMAIN}}`)
→ Domain: _____
- [ ] M365 Business Premium or higher
- [ ] Google Workspace Business Plus or higher
- [ ] Not sure — please advise
- [ ] Neither in place — please recommend

Q7. Who is your Global / Super Admin? I need a one-time consent from them to install the app registration.
→ Name: _____ Email: _____

Q8. Permissions. Check what you're comfortable granting:

- [ ] Read your email
- [ ] Send email as you — **each message requires your explicit approval**
- [ ] Send email as you — **autonomously for pre-approved templates**
- [ ] Read & create calendar events
- [ ] Read Teams / Slack chats & channels
- [ ] Post in Teams / Slack as you (with per-message approval)
- [ ] Read OneDrive / SharePoint / Drive files
- [ ] Read your contacts
- [ ] Read / create To-Do / Tasks

Q9. Off-limits. Any folders, contacts, DLs, or subject keywords that must be excluded? (Recommended: exclude attorney-client, HR, M&A folders by default.)
→

Q10. Retention. Conversation history kept for:

- [ ] 30 days
- [ ] 90 days
- [ ] 1 year
- [ ] Indefinite
- [ ] Local-only (no cross-device continuity)

Part 3 — Boundaries, People, Money · ~3 min

Q11. Inner circle. Whose messages should get priority and never sit in the queue?
→

Q12. Calendars. Which calendars should the agent see and touch?

- [ ] Personal
- [ ] {{CLIENT_COMPANY}} (work)
- [ ] Board
- [ ] Other: _____

Q13. Step-up authentication. High-risk actions (wires, cancelling a board meeting, sending anything to regulators, spend authorization) will require you to confirm on your phone with biometrics + a physical hardware key.

- Wire threshold requiring confirmation: **$**_____ (recommend $10,000)
- Any action touching these people/entities always requires confirmation: _____

Part 4 — Use Cases · ~5 min

Q14. Top 5 things you want it doing in Week 1. Be specific.

1.
2.
3.
4.
5.

Q15. Daily briefs.

- Morning brief: [ ] Yes [ ] No — if yes, time: _____ channel: [ ] Voice call [ ] Push [ ] SMS [ ] Email
- End-of-day debrief: [ ] Yes [ ] No — if yes, time: _____ channel: _____

Q16. Integrations beyond M365/Workspace. Which tools does the agent need to read from or write to?

- [ ] Salesforce [ ] HubSpot [ ] Notion [ ] Slack [ ] Dropbox
- [ ] Bloomberg [ ] CoStar [ ] Yardi [ ] DocuSign
- [ ] Your banking / brokerage (view-only via Plaid): _____
- [ ] Other: _____

Q17. Devices.

- Phone: [ ] iPhone (model: _____) [ ] Android (model: _____) [ ] Both
- Apple ID for TestFlight: _____
- Do you want it on Mac/PC too? [ ] Yes [ ] No

Part 5 — Optional: Private AI Server at Your Office · ~2 min

Applies to Sovereign Office and Sovereign Enterprise tiers.

Your assistant runs primarily on hardened cloud infrastructure I operate. That's the right default. But for a principal working on confidential deals, we can also install a dedicated AI server physically at your office — so your most sensitive work (M&A, LP letters, distressed workouts, board strategy, personal matters) can run on hardware you can touch, and go air-gapped from the internet whenever you want.

Spec: NVIDIA workstation with 192 GB of GPU memory, 512 GB RAM, 64 TB storage. Runs your entire document archive as a private RAG index at millisecond latency. Whisper-quiet, fits in a locked cabinet.

Cost: ~$46,200 delivered & configured. Two payment paths:

- **Path A — Hardware-as-a-Service:** UnyKorn buys the machine, installs it at your office, you pay ~$1,500/mo over 36 months. Machine transfers to {{CLIENT_COMPANY}} at month 36. Operating expense.
- **Path B — Direct purchase:** {{CLIENT_COMPANY}} buys directly, UnyKorn manages. Enables Section 179 depreciation.

Q20. On-prem AI server at your office?
- [ ] Yes — Path A (HaaS lease, ~$1,500/mo)
- [ ] Yes — Path B (~$46,200 capex)
- [ ] Not now — cloud-only for Phase 1
- [ ] Tell me more before deciding — schedule a call

Full spec available in `HARDWARE-TEMPLATE.md`.

Part 6 — Trust & Team · ~2 min

Q21. Who else gets access? (Executive assistant, chief of staff, spouse, board member.) Each gets scoped permissions.
→

Q22. Emergency contact. If the agent detects something urgent and can't reach you, who does it call?
→ Name: _____ Phone: _____

What {{CLIENT_COMPANY}} needs to provision

Hand this list to your IT lead or executive assistant. Target completion: 5 business days.

A. Microsoft 365 / Google Workspace — required

- [ ] Confirm M365 Business Premium (or Workspace Business Plus) is active on your mailbox
- [ ] Create a Guest User in your tenant for `kevan@ldrcllc.com` with **Application Developer** role (limited scope — only to create/manage the "UnyKorn Sovereign Agent" app registration)
- [ ] Have your Global / Super Admin available for a **one-time consent** on the app registration (30 seconds via signed URL)

B. Entra ID P1 / Workspace equivalent — recommended (~$6/user/mo)

- [ ] Enables Conditional Access so the AI is used **only** from your registered iPhone/laptop. Materially stronger security posture. Add to your account.

C. Physical hardware — UnyKorn ships

- 2× **YubiKey 5C NFC** (primary + backup) for FIDO2 step-up on wires and other high-risk actions. UnyKorn purchases; your EA enrolls them under Kevan's remote guidance during activation.

D. Voice sample — only if you chose Q3's "custom cloned voice"

- ~30 minutes of clean audio of you reading in a quiet room. Kevan sends a specific script. iPhone Voice Memos is fine. Upload via private link.

E. Nothing else

Everything else — LLM compute, voice synthesis, wake-word licensing, mobile app publishing, cloud infrastructure, monitoring, secrets management, security review — is purchased, hosted, and operated by **UnyKorn LLC** under Kevan's direct oversight. {{CLIENT_COMPANY}} receives a single consolidated monthly service invoice.

What happens after you send this back

Day	Milestone
0 (same day)	Persona, voice, and permission scope locked.
1–3	Tenant app registered. Backend deployed to hardened GCP environment. Your private endpoint stood up.
4–7	iOS TestFlight beta built with your wake word and voice. You install and start using.
8–14	Live refinement based on how you actually use it.
15–30	Production rollout. Android if requested. Integrations to the tools from Q16.

Return the completed packet — inline reply, redlines, or PDF — to **kevan@ldrcllc.com**. Call me on any of it: this is your system, and I want it built the way *you* work.

— Kevan Burns
Founder & CEO, UnyKorn LLC
kevan@ldrcllc.com

Rendering note for Kevan

Before sending, replace all `{{PLACEHOLDERS}}` and pick the correct tier language. Save the personalized copy under `clients/<slug>/INTAKE-<slug>.md`, then run `bash _render.sh` from that folder (or `cp _style.css _render.sh` down).