



Blue J Workshop Series

Building A Repeatable Process with Blue J

What We'll Cover

01 The 5-Step Repeatable Process

02 Putting It Into Practice



The 5-Step Repeatable Process

Getting the most out of Blue J means knowing how to structure your prompts — not just what to ask, but when and how to push deeper.

1

Ask Your
Question

2

Verify the
Sources

3

Refine the
Analysis

4

Pressure
Test the
Answer

5

Create the
Deliverable

Ask Your question

Start with your core tax question.

A strong prompt has:

1 Clarity

Clear and unambiguous language.

2 Context

Provide enough background info and documentation to guide the system.

3 Neutrality

Neutral questions lead to objective answers.

4 Relevance

Ensure prompt is relevant to the desired outcome

5 Completeness

Include all necessary details to avoid assumptions.

6 Use of Tax Terminology

Incorporate tax terms helps improve the accuracy and relevance if the terms are commonly found in source documents.

Verify the Sources

Review the linked authorities, including statutes, regulations, cases, and analysis

Review Source Materials

Read through the source materials, including statutes, regulations, cases, and analysis.

Ask Questions About the Source

Ask questions about the source materials used to formulate the answer.

Reviewing Citations in Blue J

The screenshot displays the Blue J interface for a legal analysis titled "OBBBA's Impact on Tax Exemptions". The interface includes a sidebar with navigation options like "Home", "Search", and "My Library". The main content area is divided into sections: "Legal and Planning Implications", "Conclusion", and "Cited sources".

Legal and Planning Implications

- The OBBBA averted the scheduled reduction of the exemption to pre-TCJA levels, instead increasing and making permanent a higher exemption.
- The increased exemption applies to estate, gift, and GST taxes.
- Inflation adjustments will apply starting in 2027, using 2025 as the base year.
- Portability and other traditional planning tools remain available.
- The annual gift tax exclusion and the exclusion for gifts to non-citizen spouses continue to be adjusted for inflation.

Conclusion

The OBBBA permanently increased the federal estate, gift, and GST tax exemption to \$15,000,000 per individual (indexed for inflation after 2026), effective for decedents dying and gifts made after December 31, 2025. This change provides significant additional transfer tax planning opportunities and certainty for high-net-worth individuals and families [4] [6] [5] [3].

Cited sources

- [1] [STATUTE](#) Sec. 2010 Unified credit against estate tax | [Summarize](#)
- [2] [STATUTE](#) Sec. 2505 Unified credit against gift tax | [Summarize](#)
- [3] [ADMIN](#) Rev. Proc. 2025-32 | [Summarize](#)
- [4] [COMMENTARY](#) Blue J Resource: P.L. 119-21 (H.R. 1, One Big Beautiful Bill Act, OBBBA) Summary | [Summarize](#)
- [5] [COMMENTARY](#) Viewpoint: Adjusting an Estate Plan Following the One Big Beautiful Bill Act | [Summarize](#)
- [6] [COMMENTARY](#) Blue J Resource: Estate and Gift Tax Inflation Adjusted Amounts (2022-2026) | [Summarize](#)

At the bottom of the interface, there is a "Show 2 additional relevant sources" link, a "Help Center" link, a "Logout" button, and a "Just ask..." search bar.

Refine the Analysis

Ask follow-up questions to:

- Test Different Scenarios
- Explore Exceptions
- Layer in Context
- Evaluate Alternative Positions

Pressure Test the Answer

Ask your solution to:

- Defend Its Conclusion
- Identify Contrary Authority
- Explain Competing Interpretations
- Point Out Weaknesses in the Analysis



Pressure Testing Prompt Examples

Pressure testing doesn't require starting over. Simple follow-up questions can help you validate your analysis, uncover exceptions, and build greater confidence in your final conclusion.

- **What else exists in the source materials that could challenge the analysis so far?**
Reduces confirmation bias by searching for evidence that challenges the current conclusion.
- **Are there any risks to the position as stated in this thread?**
Highlights potential exposure, uncertainty, and practical considerations before relying on the conclusion
- **What risks or areas of uncertainty remain?**
Identifies unresolved issues, judgment calls, or areas where additional research may be warranted before advising a client.
- **What facts would change this conclusion?**
Quickly identifies the key assumptions driving the analysis and highlights which facts are most material.

Create the Deliverable

Turn the thread into a polished deliverable

Choose the format that fits your audience

1

Client Email

Concise, non-technical, executive tone.

2

Client Memo

Detailed, with an executive summary.

Client Email

A short, plain-language summary written for someone without a tax background.

Client Memo

A fuller write up with an executive summary, facts, analysis and conclusion.

Executive Summary

Facts

Analysis

Conclusion

Other Output Formats to Try

Once you're comfortable with the core workflow, push further with these formats.



Presentation Outline

Turn your analysis into
slide-ready talking points



Pre-Meeting Speaking Notes

Prep for a client call with
a clean set of notes



Questions to Test a Junior's Understanding

Turn the thread into a
quick comprehension
check

The 5-Step Prompting Process

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Ready to put this into practice?

Q&A

Thank you