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AI for Real Life

Turning AI Tools Into Your Everyday Advantage

Barry Glassman | May 20, 2026
GlassmanWealth.com

What This IS — and ISN'T

Isn't

- Debating AI's good vs. evil
- Predictions about job losses
- Robot takeover fears

Is

- Level up the way you use AI
- Nuggets you just didn't know existed
- Real things you can do this week

Everyone is at a different place with AI — this is a conversation, not a lecture.

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Poll: How are you currently using AI?

Just Getting Started

You've heard about AI but haven't tried it much yet.

Occasional User

You've tried ChatGPT or AI a few times. You want to get more out of it.

Advanced User

You use AI often. You're here for the nuggets you don't know yet.

Stop Searching. Start Talking.

The most important mindset shift in using AI

OLD WAY

"best restaurants Rome"

You get links. You do all the work.
Search gives you a list and leaves.

NEW WAY

"I'm in Rome 3 days, love authentic food, hate tourist traps, near the Pantheon — Given what you know about restaurants we love, where should I eat and why?"

AI thinks WITH you.
It reasons, follows up, and
IF DONE RIGHT
tailors the answer specifically to you.

AI is not a database. It's a conversation partner.

AI Makes Stuff Up.

Smart Intern, Not Encyclopedia

HALLUCINATION - every platform does it.

AI answers confidently even when it is completely wrong.
Always verify anything factual before acting on it.

A Privacy Warning — And I Mean It

We still don't fully know how sharing personal info may impact public knowledge.

DO NOT SHARE

- Social Security numbers
- Passwords or PINs
- Full medical records
- Confidential work docs

BE THOUGHTFUL

- Specific health details
- Financial account specifics
- Personal family situations

SAFE TO USE

- General questions
- Writing assistance
- Planning and research
- Learning anything

Rule of thumb: If you wouldn't say it in a coffee shop, don't paste it into AI.

Privacy and Power Are Not Opposites

Too much:

"Here are my complete lab results from Dr. Smith at Johns Hopkins…"

Better:

"My LDL Cholesterol is 220. What questions should I be asking my doctor?"

You get the same value — without exposing your private details.

Enormous value from AI without sharing a single sensitive detail.

Which Platform Is Right for You?

Platform	Best For
ChatGPT	All-around powerhouse - widest features, most integrations
Claude	Long documents, nuanced writing, deep reasoning, memory, coding
Gemini	Deep Google integration — Gmail, Docs, Drive, and Calendar
Copilot	Microsoft 365 — Word, Excel, Outlook
Perplexity	Research with live web citations — excellent for reducing hallucinations

My honest advice: Pick ONE. Get really good at it. They're more alike than different.

Free vs. Paid — Worth $20 a Month?

ChatGPT Plus ($20 / month)

- Best AI reasoning model
- Live camera — point at real objects
- Advanced voice mode
- Full memory across sessions
- 5x more daily usage

Claude Pro ($20 / month)

- Stronger reasoning model
- Full-length documents — even entire books
- Projects — persistent workspaces
- Full memory across sessions
- 5x more daily usage
- Priority access — never throttled

A brilliant assistant for less than $1 a day.

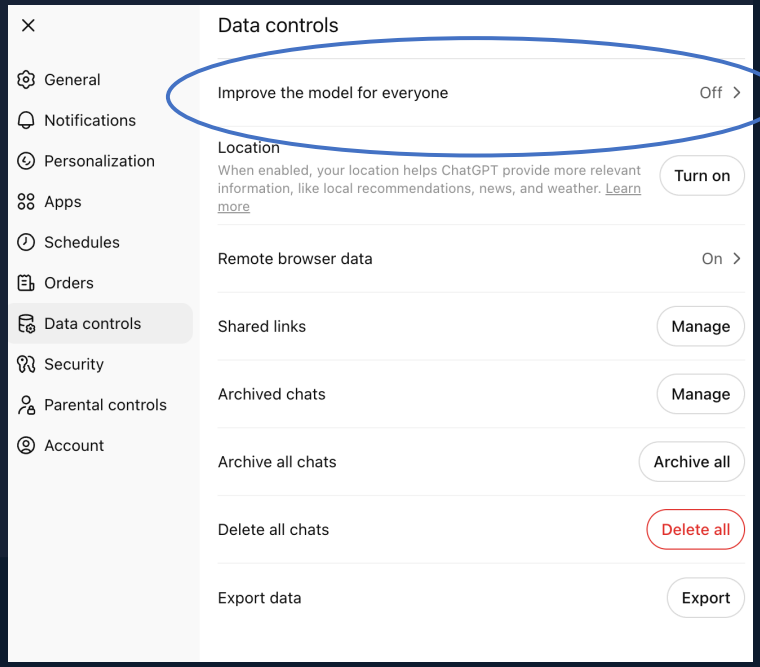
Does Paying Mean More Privacy?

No. Paying does NOT automatically mean private.

Both free and paid plans may use your chats to train AI — unless you opt out.

How to opt out: Settings → Data Controls → Turn off "Improve the model for everyone"

Paying buys you better tools. Privacy requires you to actively manage your settings.



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Download the App Tonight

APP ONLY

- Live camera — point at anything real-world
- Voice mode — real back-and-forth conversation
- Home screen shortcut — instant access anytime
- Hands-free: car, walks, kitchen

WEBSITE BETTER FOR

- Long document work at your desk
- Heavy copy-paste tasks
- Side-by-side browser tabs

The live demos I'm about to show only work on the app.

Making AI Know You

Step 1: Custom Instructions

Tell AI who you are

- **Ask AI to ask questions to get to know you**
- **Share past itineraries**
- **What do you dislike? (Long-winded fluff?)**

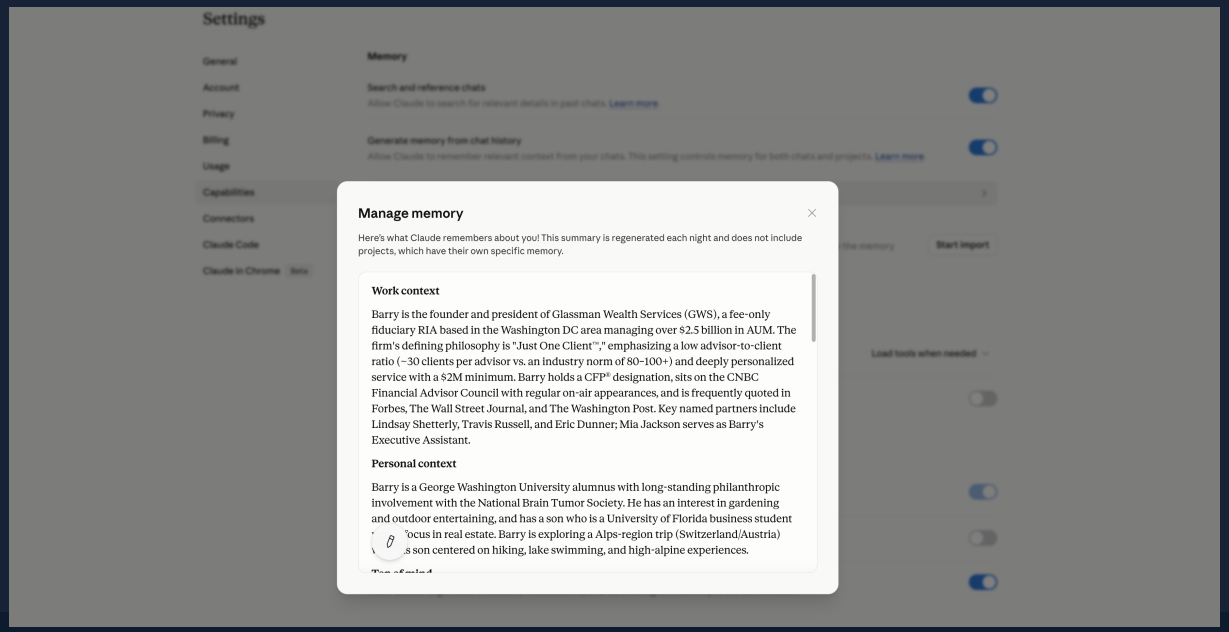
WHERE TO FIND IT

ChatGPT: Profile → Customize ChatGPT **Claude:** Profile → Claude's Memory

Every future conversation now starts with AI already knowing you.

Making AI Know You

Step 1: Custom Instructions



Making AI Know You

Steps 2 & 3: Your Writing Style and Personality Profile

Step 2: Your Writing Style

Upload 3–5 emails you've written. Then ask:

"Describe my writing style — tone, formality, tendencies."

Save that description. Now AI writes AS you, not as a generic assistant.

Step 3: Your Personality Profile

Share your DISC, Myers-Briggs, Kolbe, or StrengthsFinder:

"I'm an INTJ. High Fact-Finder on Kolbe. Use this when advising me."

AI frames responses in ways that fit how your mind works.

This is underused and incredibly powerful.

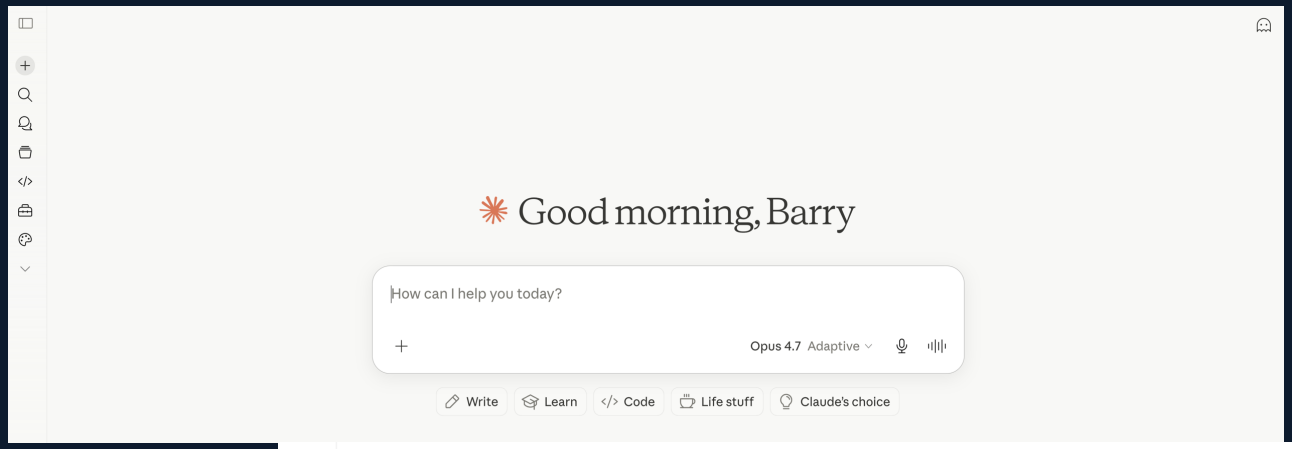
Step 4: Your Personal Summary

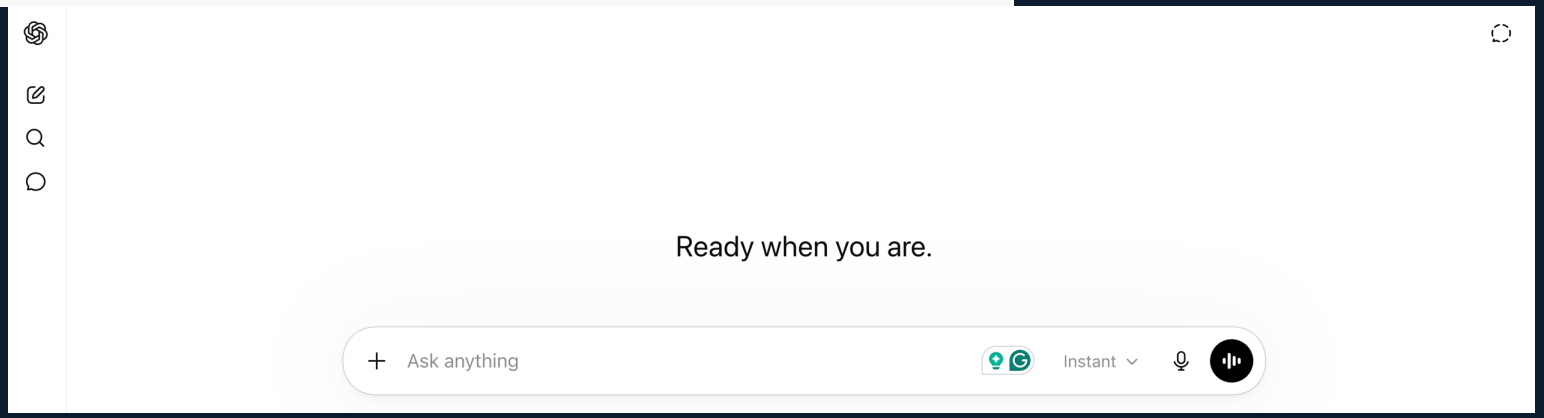
After a great conversation, ask AI to capture it:

"Write a summary of who I am, what I care about, and how I like to work. I'll use this to onboard you in future chats."

Gets richer every time you update it.

Don’t Remember This





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Prompting Basics: The 5+ Part Framework

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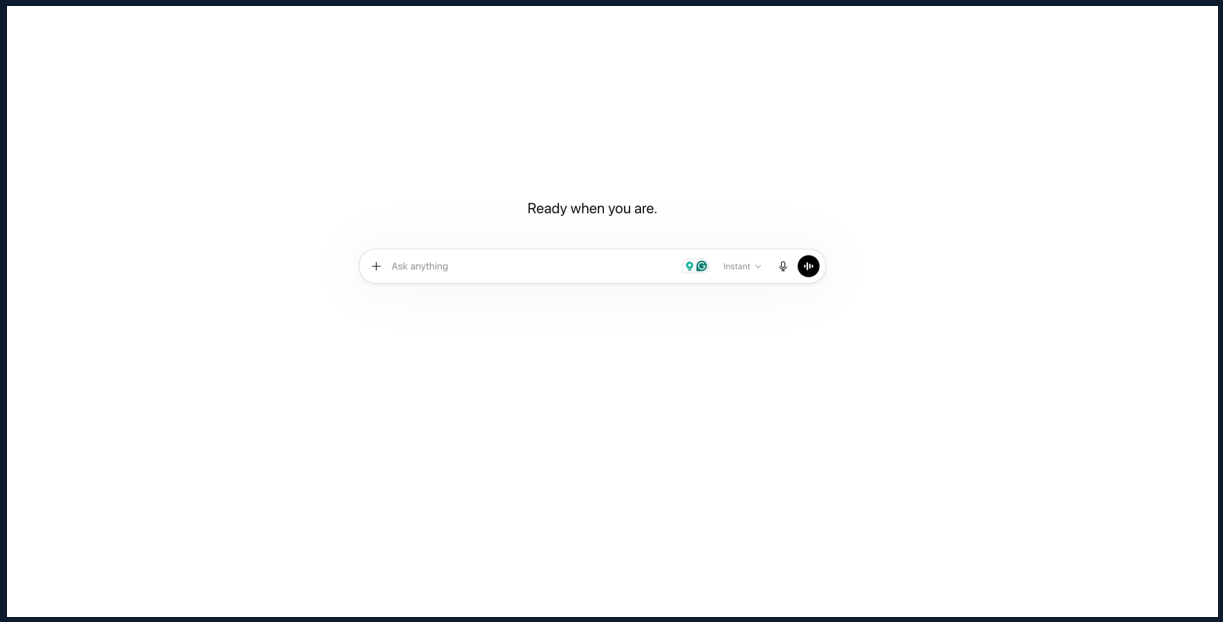

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Prompting Basics: The 5+ Part Framework

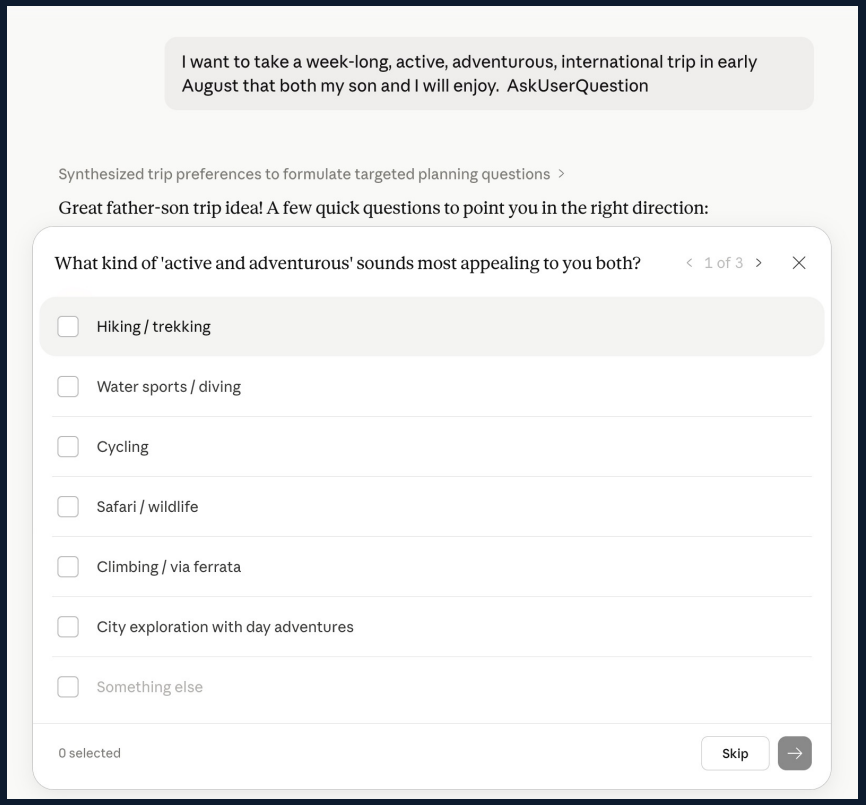
Adventure Destinations in Europe

1	**ROLE**	*"Act as a travel advisor with 20 years of experience…"*
2	**CONTEXT**	*"I want to take a week-long, active, adventurous, international trip in early August that both my son and I will enjoy. I've attached past hotels / itineraries we've enjoyed."*
3	**TASK**	*"Search destinations, hotels, activities and tour groups"*
4	**CONSTRAINTS**	*"No heavy mountain biking, nor skiing. Avoid tourist traps. We want to eat where the locals eat. Must have warm weather."*
5	**OUTPUT**	*"Build five itineraries in excel. Include links and pictures to tour groups and destinations."*

Always add: "Before you answer, ask me any clarifying questions."

Prompting Basics: The 5+ Part Framework

Claude: Use "AskUserQuestion"



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Advanced: Let AI Fix Your Prompt

Here's the nugget most people never discover:

Write your prompt — then add:

"Rewrite this as a professional, expert-level prompt. Then answer using your improved version."

Advanced: Reduce Bad Info

Write your prompt — then add:

Before finalizing your response, rigorously audit your work against the original prompt and confirm every requirement has been directly and fully addressed. Verify all facts, figures, and claims using reliable, current sources, and clearly distinguish between verified information, assumptions, and speculation; if anything cannot be validated with high confidence, either find a credible source or explicitly flag it as unverified. Challenge your own conclusions for errors or gaps, and if confidence is not high, state that clearly and explain why rather than presenting uncertain information as fact.

DEMO

Voice Mode

A real back-and-forth conversation. Not voice search. A real dialogue.

In the car	On a walk	Cooking dinner	At 2am

LIVE DEMO

USE IT FOR:

- Thinking through a decision
- Processing a problem hands-free
- Drafting ideas out loud
- Educating yourself quickly

DEMO

Live Camera

Point your phone at anything. Ask questions in real time.

- Dishwasher error code
- Plant not thriving
- Drug label / interactions
- Medicare statement
- Car dashboard warning
- Confusing piece of mail

This is not the future. I'm doing it right now.

Real Use: Fighting the Legal / Insurance Battle

"Act as a medical advocate and healthcare attorney. Give me firm, professional language to respond to this — the kind that signals I know my rights and I'm not going away."

AI levels the playing field.

Also works for:

- Credit card disputes
- HOA violations
- Insurance auto-denials
- Bill negotiation

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Advanced AI to Learn

1

Claude Projects & Skills

Organized workspaces
Reusable skills

2

Chat GPT Custom GPTs

Personalized AI
Trained on your data

3

Gemini Spark

Accessible
AI Agent

Infinite possibilities that are changing every single week

What You Now Know

Six ideas to take home tonight

1 Talk to It — Don't Search It

Be specific. Give context.
AI is a conversation partner, not a search engine.

2 It Makes Stuff Up — Verify

AI is a smart intern, not an encyclopedia.

Always confirm facts before acting on them.

3 Protect What's Private

Don't paste sensitive info.

Keep questions general - you still get enormous value.

4 Make AI Know You

Custom instructions, writing style, personality profile, and a personal summary =

Better Results

5 Prompt Like a Pro

Role → Context → Task → Constraints → Output.
Ask AI to improve your own prompt before answering.

6 AI Is Already Acting

Voice, camera, fighting battles, real research - agentic AI is here right now.

Your challenge tonight: open ChatGPT or Claude — free is fine — and ask it something you've been wondering about. Just try it once.

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