everplans

How to leave a legacy.

A simple guide for you and your family.

Financial

Pets

Health & Medical

Family Recipes

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“My goal is to make it as easy as possible for the person who has to ‘clean up after me’ to get through the necessary notifications. Your idea is visionary. Thank you for doing this.”

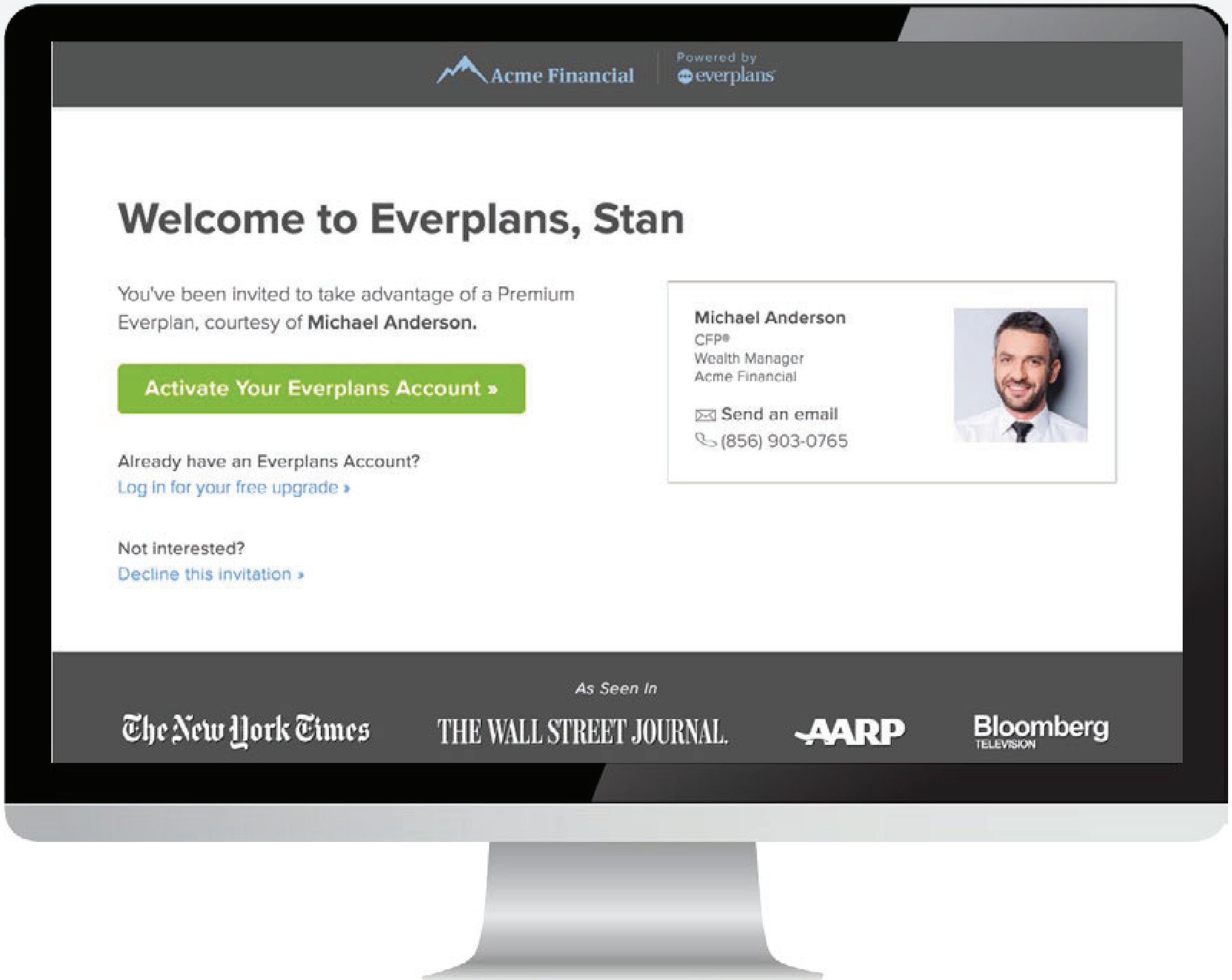
—Kay from California,
Everplans user since 2014

This is bigger than your Will, but as easy as sharing a family recipe.

Life and legacy planning takes you beyond finance and insurance to also focus on the important everyday details you need your loved ones to know.

- Things like account numbers, passwords and usernames.
- Information about cherished items like family photos and secret recipes.
- Details not only about who gets the heirlooms, but *stories* of why those heirlooms matter.

This is what really matters, and this is how you organize, store and securely share it with the people who matter most.



The first and most important thing to know is that Everplans is easy.

It's a step-by-step guide through your life and legacy. It walks you through legal, financial, healthcare and personal decisions. And it gets to the heart of your final wishes.

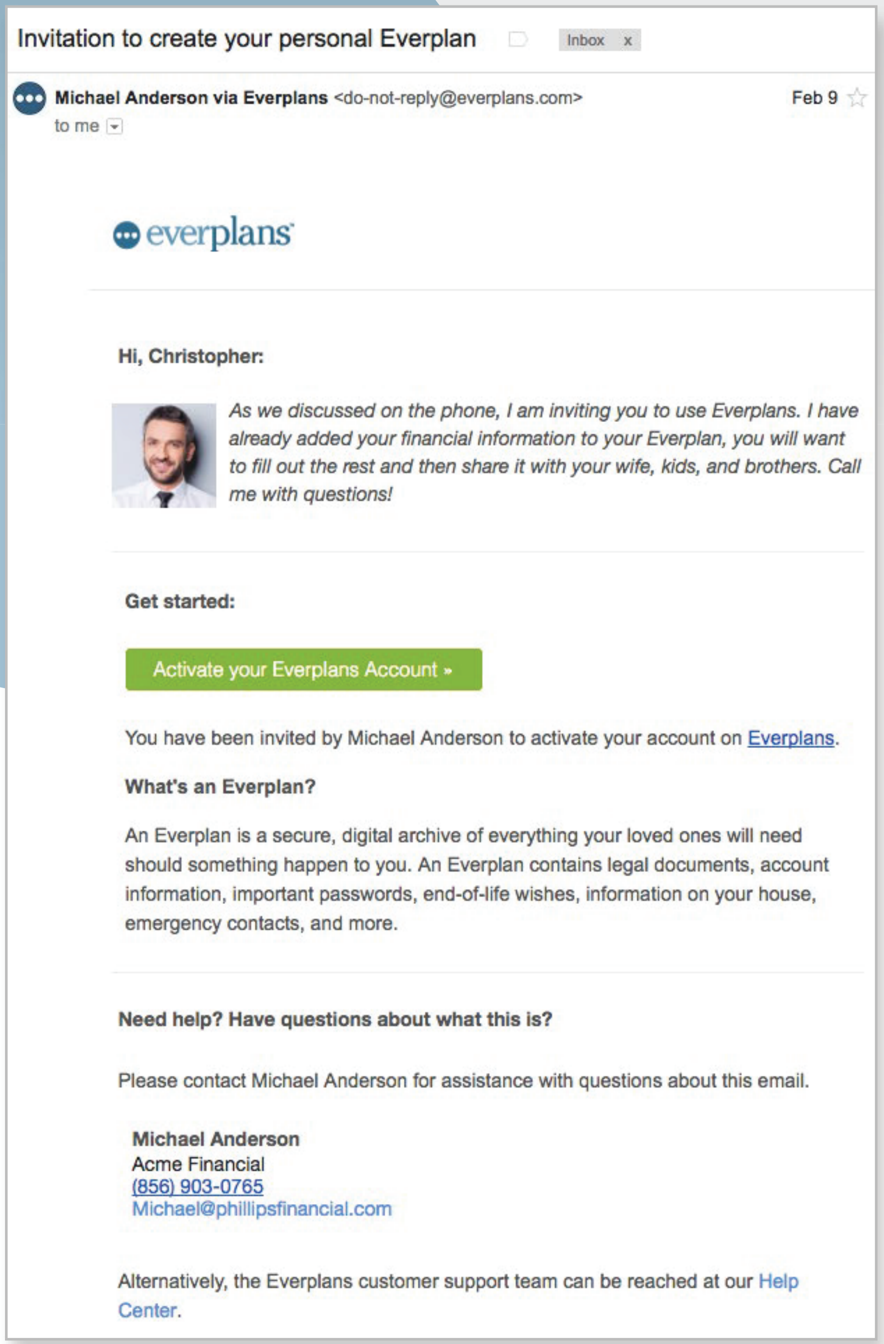
In the end, your loved ones aren't left with questions or concerns.

Organize, store and securely share: something you’ve spent your whole life trying to do.

Everplans helps you organize your vital documents and final wishes. It guides you through what to save and gives you a place to save it. It also provides tips, checklists and cheat sheets to make organizing the hard stuff easy.

Everplans offers secure storage so you can safely save all your information in one, convenient place. It’s like an electronic safety-deposit box.

Everplans lets you designate “deputies”—friends, family, and beneficiaries have access to all or some of your information. So that even after you’re gone, you have control over who sees what.


Invitation to create your personal Everplan Inbox x

Michael Anderson via Everplans <do-not-reply@everplans.com> Feb 9

to me

everplans

Hi, Christopher:

As we discussed on the phone, I am inviting you to use Everplans. I have already added your financial information to your Everplan, you will want to fill out the rest and then share it with your wife, kids, and brothers. Call me with questions!

Get started:

Activate your Everplans Account »

You have been invited by Michael Anderson to activate your account on Everplans.

What's an Everplan?

An Everplan is a secure, digital archive of everything your loved ones will need should something happen to you. An Everplan contains legal documents, account information, important passwords, end-of-life wishes, information on your house, emergency contacts, and more.

Need help? Have questions about what this is?

Please contact Michael Anderson for assistance with questions about this email.

Michael Anderson
Acme Financial
(856) 903-0765
Michael@phillipsfinancial.com

Alternatively, the Everplans customer support team can be reached at our Help Center.

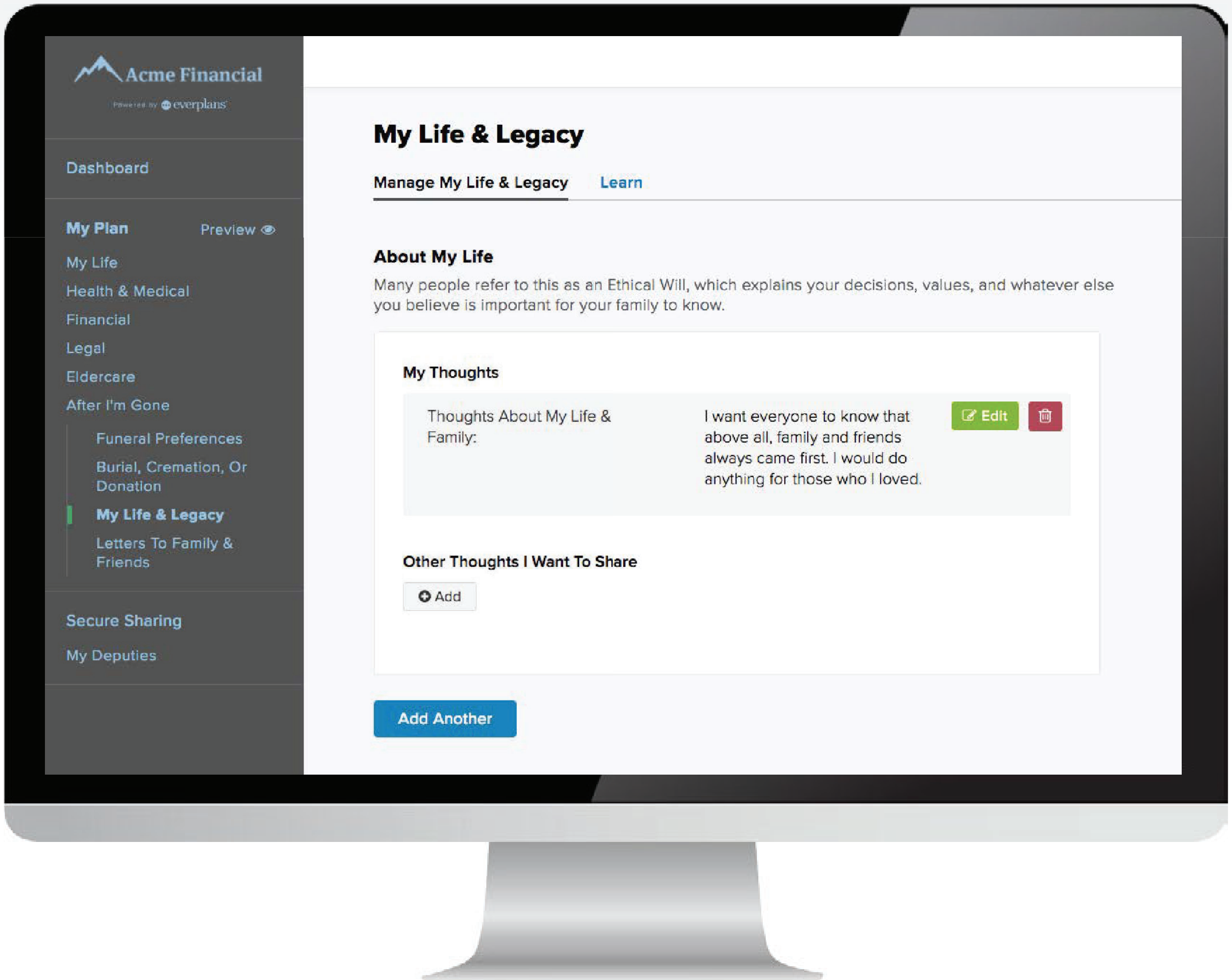
It starts with a simple invitation.

Your financial advisor will get you setup, so it's easy for you to get started.

You'll get a personalized email inviting you to activate your account, and with a one click, you'll be on your way to securing your family's future.

"I was exceedingly impressed by Everplans. Signup was a breeze—the interface was user-friendly, the explanations were clear, and the whole process only took a few minutes."

—Alex from California,
Everplans user since 2014

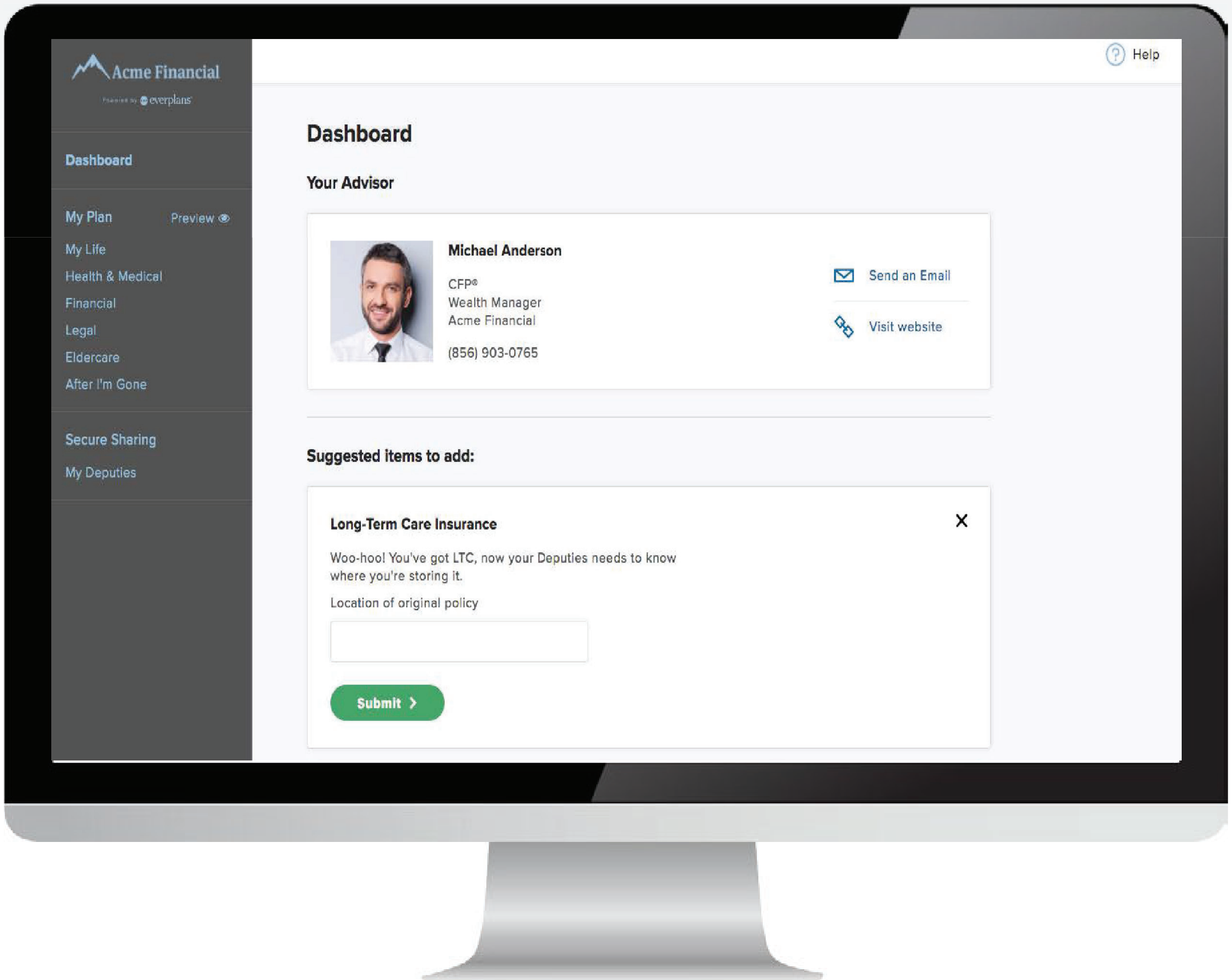


Getting personal about your life and legacy.

The Everplans platform is easy to navigate. Just follow the prompts to explain your decisions, express your values and share anything else you want your family to know.

You can also easily add and update details about the possessions that matter most to you and the memories you hold dear. You can talk about whether you want flowers at your funeral or gifts shared with your favorite charity.

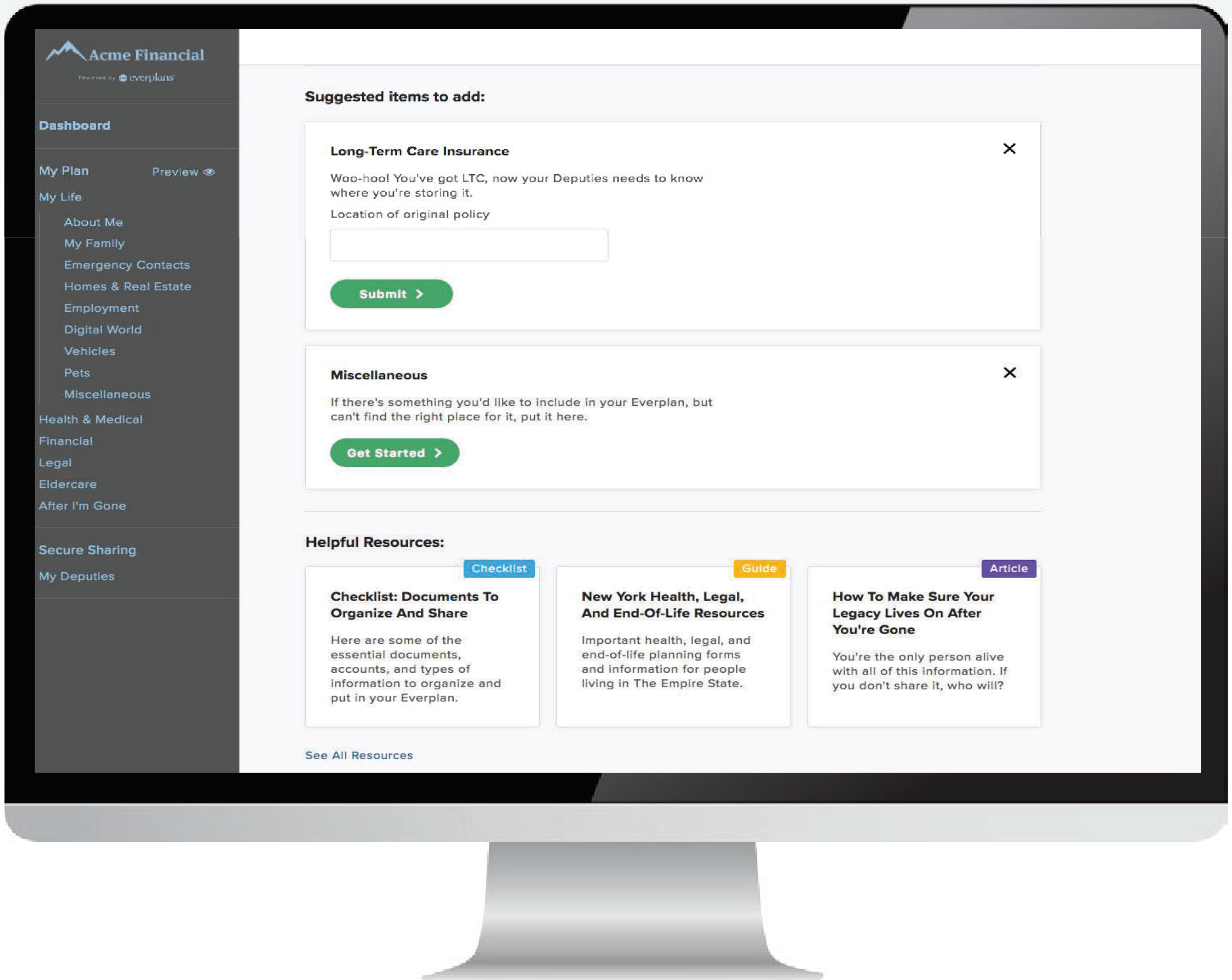
It's a way to share and preserve your most important wishes, whatever they may be.



Leaving your family in comfort, not confusion.

Taking care of your loved ones means taking care of the medical, legal and financial documents they'll need after you're gone.

Everplans allows you to upload this information—from sources such as your Will or life insurance policy—straight to the site. Or, you can simply leave directions as to where those documents are stored.

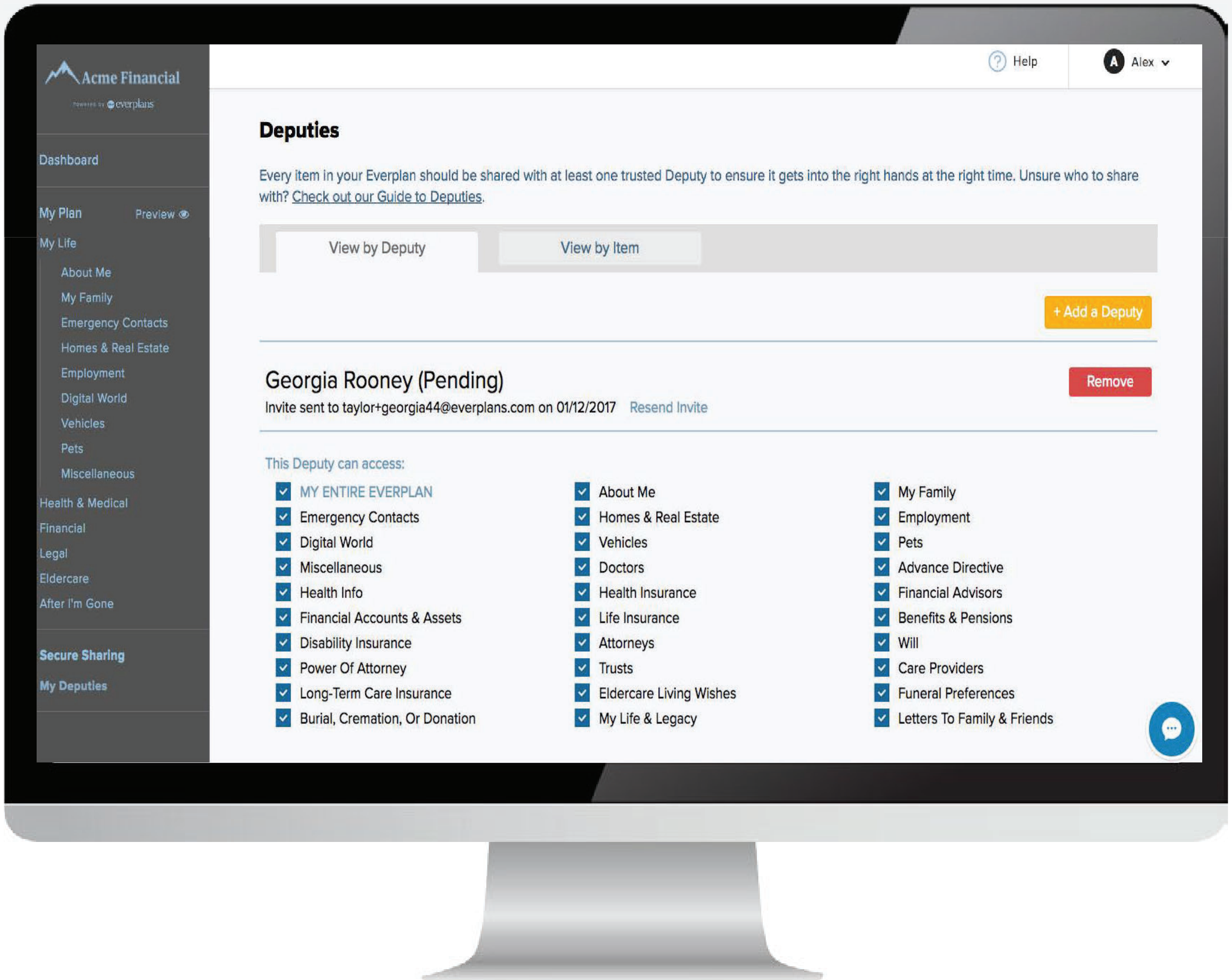


What to do and when to do it.

You control your plan, and Everplans will be there to help keep things on track.

You'll get to-do lists to make sure you have everything you need, reminders about what might be missing or incomplete, and directions for your next steps.

You won't ever have to worry about where your plan stands, because you'll always have a guide to keep things moving.



Picking people to be part of your plan.

Your family. Your friends. Your advisors. The people you choose to view your plan—either in part or in total—are entirely up to you.

These “deputies” will see only what you want them to see. So you can leave separate and distinct letters to each of your children. You can give your spouse access to your entire plan. And let your advisor manage the details.

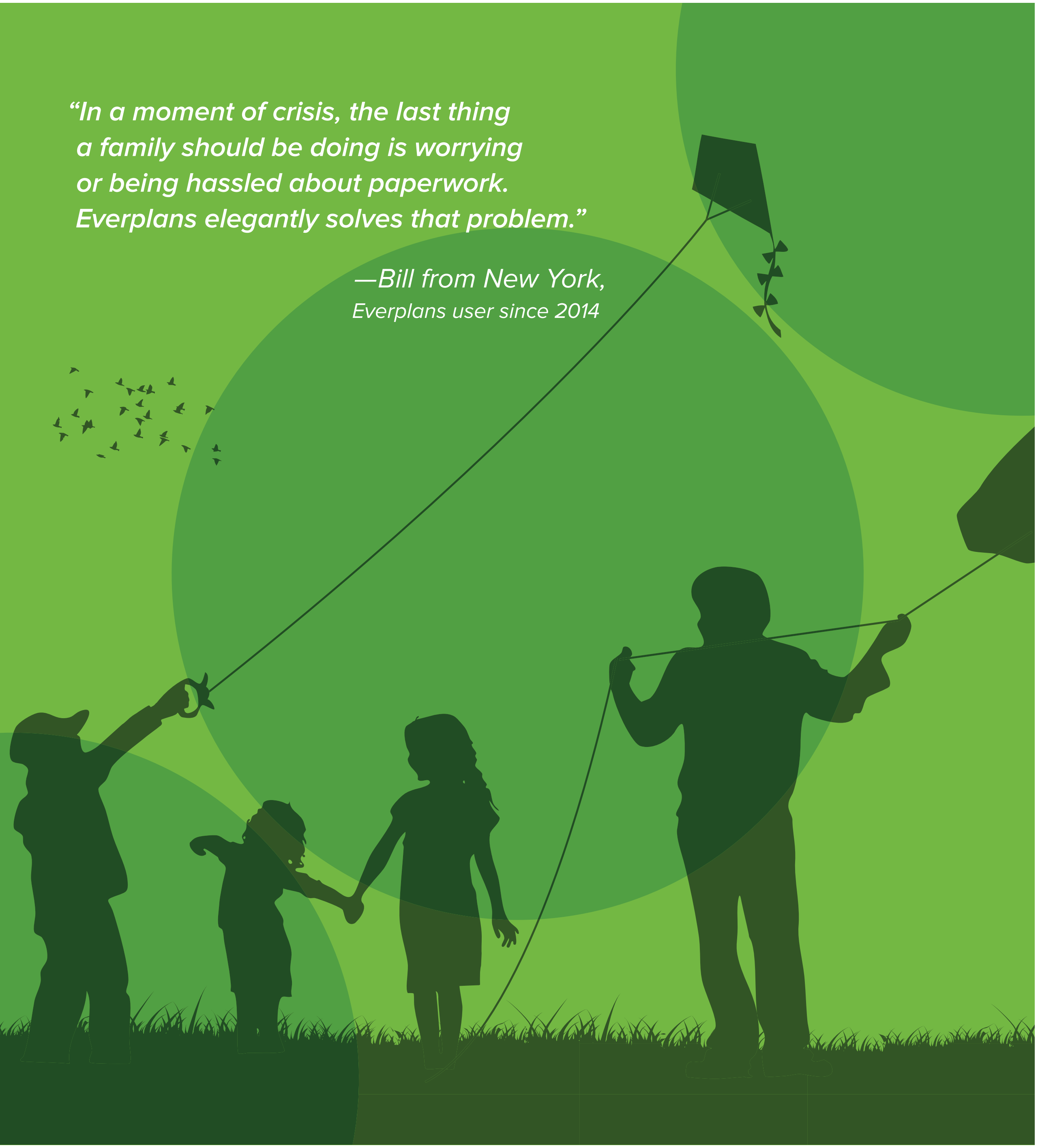
It’s up to you. And Everplans will notify them by email anytime you update your plan.

You can never have too much security.

Because Everplans deals with people's most private matters, you get the highest levels of security.

But it isn't enough to say it. Everplans proves it:

- Everplans engineers are continually working to enhance and advance system security
- Investments and partnerships with leading financial and insurance institutions provides a solid Everplans foundation
- You can download a PDF of your plan at any time, and in the unlikely event of a fundamental change in the business, you'll be notified in time to get your plan



Everplans is a great tool, but that’s not what makes it great.

It’s simple to organize, store and securely share your information, but that isn’t what matters most.

With Everplans, your family won’t be running down details. They won’t be arguing over what they *think* you want or where you left the documents.

They’ll have everything they need, so they can simply celebrate your life and legacy.

Give them this kind of comfort and security.
Let them know everything is taken care of.

everplans™

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