KENDRICK
WEALTH MANAGEMENT

FINANCIAL PLANNING. PERSONALIZED.
WEALTH MANAGEMENT. CUSTOMIZED.

Secure a plan for your family’s future

Kendrick Wealth Management clients can now access a life and legacy platform dedicated to transforming organization.

Establishing your legacy is so much more than passing on financial well-being to future generations; it includes your health wishes, your family information, and even your favorite recipe. That’s why we’re offering you access to Everplans, a highly secure online tool dedicated to transforming the way people get their families organized. This life and legacy platform is built to help you compile all the details about your will, trusts, doctors and more.

WHEN YOU JOIN EVERPLANS, THEY CAN SAFEGUARD YOUR MOST CONFIDENTIAL DETAILS REGARDING:

Your life

- Your family
- Employment
- Emergency contacts
- Homes & real estate
- Vehicles
- Digital world
- Pets

Your legal documents

- Trusts
- Will
- Power of attorney
- Attorneys

Your health and medical records

- Health insurance
- Advance directive
- Doctors
- Health information

Your eldercare details

- Long-term care insurance
- Eldercare living wishes
- Care providers

Your finances

- Life insurance
- Financial advisors
- Financial accounts & assets
- Benefits & pensions
- Disability insurance

Your legacy wishes

- Burial, cremation and donations
- Letters to family and friends
- Funeral preferences

EVERPLANS' SECURITY FRAMEWORK

Everplans approaches security using the following framework:

- Securing your data at rest
- Securing your data in transit
- Operational procedures to keep the site secure
- Strict limitations around administrative access to your information
- Two-factor authentication for end users

STEPS TO SAFEGUARD YOUR INFORMATION

You can assign delegates to any of the sections of your profile so they have access to your information when needed, now or later. Customize which of your loved ones have access to which sections, ensuring your information goes to those who need it most.

Everplans takes careful, consistent precautions to keep your information secure. They regularly audit their environments and code for any security issues, and maintain strict internal procedures that allow their employees and administrators to view a limited set of your data should they help you access your account.

Let's plan for your family's future, together, with Everplans.

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