



K E N D R I C K

WEALTH MANAGEMENT

What plan do you have in place to navigate your life and legacy?

You probably have plans in place already, but does your family know what—or where—they are? We can help you organize everything from Wills and Life Insurance to account numbers, passwords and family recipes you want to share.



Ask yourself these five questions

to see if the people that matter most to you can find what they need if you're not around to help them.

1.

Does your family know what types of insurance (and how much coverage) you have?

Billions of dollars in insurance coverage goes lost or unclaimed each year. Are all of your coverage details consolidated in one place so your family doesn't suffer the same fate? Would your family know what company or who to contact to access those details?

2.

How easy would it be for you or your family to navigate the maze of your online accounts?

What if you wanted to completely unplug and delete or cancel all of your digital accounts? Or wanted to ensure your family had the keys to access them? How many accounts do you have? Between email, social media, entertainment, retail, finance, health—probably way more than you think.

3.

Does your family know about all the benefits, financial accounts, investments, and other assets you have worked so hard for throughout your life?

This includes your checking, savings, 401(k), pension, stock options, and other valuable investments and assets. Do they know the names of the financial institutions or who to contact to access those benefits?

4.

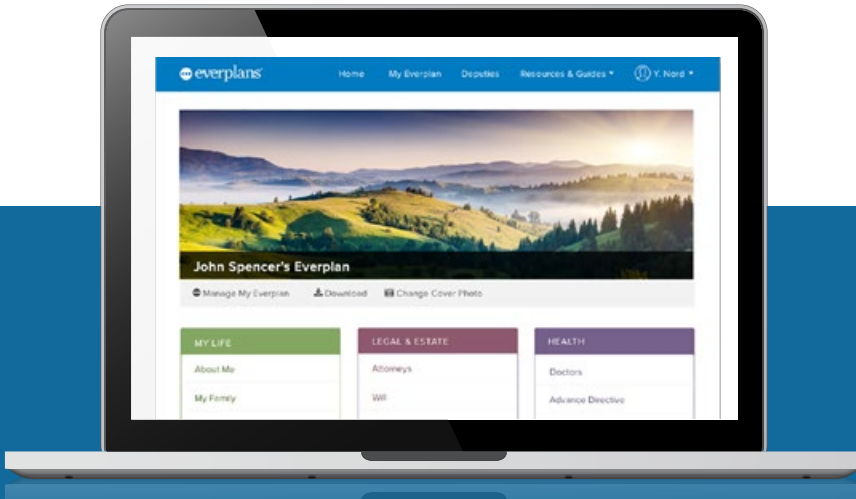
You know about your doctors, specialists, medicines and allergies—but does your family?

This information is often needed in the most inopportune times, and having this information easily accessible during the time of a medical emergency can be critical.

5.

How about all of those memories that have shaped your life story and that you hold so dear?

You are the only person alive with all this information. If you don't share it, who will? This is the story of your life—personal lessons, tips, and knowledge you'd like to pass on. It's information about your family history, favorite recipes, and the stories behind photos and special keepsakes.



Everplans helps you turn what may be disconnected details into a single, secure roadmap for your family. You can organize and securely store your most important documents and wishes—but best of all, you can share them with your loved ones, so you can all be confident things are under control and kept up to date.

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