



INCREASE YOUR VALUE  
TO YOUR CUSTOMERS

## New Services to Navigate the Estate Process

 LegacyNOW

 | NotifyNOW

 | InheritNOW

The Estate Registry offers solutions that families and executors value most.

The Estate Registry services include: a digital estate lifecycle management and advanced planning platform to navigate the estate process (LegacyNOW), a set of online tools to support executors (NotifyNOW) and a rapid inheritance advance service (InheritNOW).



[Estate-Registry.com](https://www.Estate-Registry.com)



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## Digital Life & Estate Planning Management Platform

LegacyNOW is a platform that helps your at-need and pre-need families gather all of the information they will require in one convenient secure digital vault.

Although LegacyNOW is designed primarily for people to prepare and provide information to their families and executors in advance, it's also a valuable tool for at-need families who need to fulfill their duties beyond the ceremony, saving them time and money.

### A central repository at their fingertips.

LegacyNOW provides a single place for all the information families and executors will need—and a convenient system for storing all the required information they gather.

The state-of-the-art platform gives families and individuals a place to capture information, make changes, and easily upload copies of important documents.

Additionally, LegacyNOW provides notification and information of the customer's passing directly to NotifyNOW, which in turn automatically sends notifications to all creditors, utilities, and vendors of the account holder's passing.



### How you benefit

- Improves connection and communication with families and heirs
- Increases insight into families' total financial picture
- Ensures opportunity to convert heirs into new customers
- Provides additional service & fee revenue
- Creates cross-selling opportunities

### How your customers benefit

- Reduces stress by organizing estate matters in a digital vault
- Enables sharing with other service providers and family members
- Saves executor's time notifying creditors
- Provides peace of mind for future heirs



## Assists Executors With Easier Digital Notifications To Creditors

NotifyNOW automates and streamlines the process of securely registering, storing and reporting the passing of a deceased account holder to all subscribed creditors, utilities, and vendors. Our secure, online platform allows notifiers to enter the decedent's creditor information in one location and upload a death certificate to be sent to creditors on the notifier's behalf. The solution is also directly integrated with LegacyNOW, where the creditor information can also be directly pulled and quickly submitted for immediate notification. Funeral professionals can now have a co-branded portal that can be used as a bereavement tool.

By sharing NotifyNOW with the next of kin of the decedent, you can build your reputation as a compassionate care organization.

Our specialists follow each case and work with the notifier and creditor to ensure all steps in the process and compliance with federal and state procedures are completed for each account.

Customers can expect the same level of quality and service from NotifyNOW that they receive from your company. NotifyNOW reduces the stress and time-consuming financial responsibilities of the executor tasked with the burden of retrieving creditor data.



### How you benefit

- Reduces repetitive processes
- Co-branded self-service portal
- Streamlines notifications
- Improved service/empathy
- Positive reputational impact

### How your customers benefit

- Eliminates multiple creditor contacts
- Reduces cost of multiple death certificates
- Lowers stress during a time of grieving
- Privacy and security
- Risk/Fraud mitigation

# N | InheritNOW

## An Inheritance Advance Is Just What Some Customers Need. Now.

### What is an Inheritance Advance?

InheritNOW helps people move through the grief of losing a loved one and reduces the added stress of worrying about finances by providing fast and easy inheritance advances. An inheritance advance puts inheritance funds into the hands of beneficiaries almost immediately, eliminating the need to wait for the probate process to complete.

Here's how: Our funding analysts evaluate the details of a person's inheritance and then offer an advance. If accepted, we send the funds electronically or via overnight shipping. We take the risk of

waiting for the estate to close and are then compensated directly from the estate based on our mutual agreement. The advance is not a loan, so there are no repayments to be made.

### Offering Inheritance Advances to Your Community

As a funeral professional, your community relationships are built by being of meaningful service. Helping families get their inheritance faster is an opportunity to serve. We can provide your customers immediate liquidity while reducing family stress and giving them space to grieve.



#### How you benefit

- Provides a new way you can be of service to your customers
- Offers additional revenue opportunity
- Requires no investment on your part

#### How your customers benefit

- **Fast** - Your customer can receive their funds in as little as one day
- **Flexible** - We tell your customer how much we can advance, and they choose how much they'd like to receive depending on their needs
- **No hidden fees** - The terms of the advance are simple and agreed on ahead of time