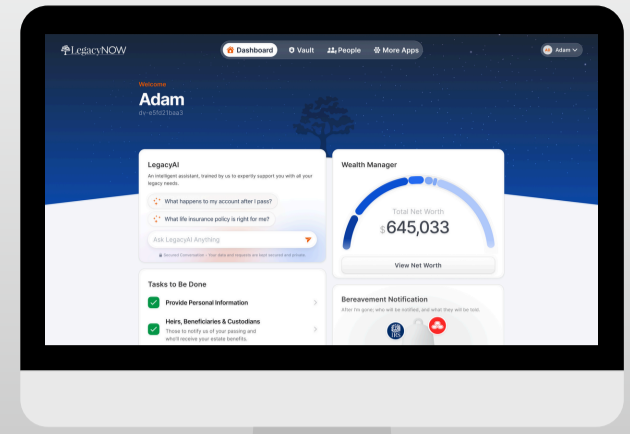


ARE YOUR CLIENTS' FINANCIAL WELLNESS PROGRAMS MISSING A LEGACY COMPONENT?

Comprehensive digital estate planning platform that goes beyond traditional will-creation services.



INTEGRATED SOLUTION PLATFORM

LegacyNOW

A comprehensive digital estate management platform - think of it as creating a modern-day treasure map to life's most precious assets. Unlike basic will-writing services often buried within legal benefits, LegacyNOW provides a secure vault where employees organize their complete digital legacy, from financial accounts and legal documents to family photos and personal assets.

NotifyNOW

Acts like a digital carrier pigeon service - automatically delivering critical notifications to financial institutions and service providers, eliminating dozens of painful phone calls for grieving families. Seamlessly accessed when families need support.

WHEN EMPLOYEES FEEL CARED FOR

This solution builds trust that drives measurable results:

Employee Metrics

Engagement: **2.4x Higher**

Productivity: **1.9x Higher**

SOURCE: METLIFE 2025 EMPLOYEE BENEFIT TRENDS STUDY

Market Opportunity

60% of Americans lack estate planning, yet 58% would create one if offered through work. Estate planning is the #1 most-utilized group legal benefit.

FOR YOUR CLIENTS

Help your clients address the trust gap where 87% of employers say they demonstrate care, but only 52% of employees feel cared for. This solution builds the trust that drives measurable business impact.

BROKER PARTNERSHIP BENEFITS



Stand Out

Lead with a high-demand, modern platform.



Revenue Model

High value, recurring income.



Proven ROI

Backed by clear metrics that resonate with clients.



Built to Scale

Mid-market to enterprise clients.

FOR EMPLOYEES

Bridge the gap between financial planning and legacy protection, reducing stress during times of loss while keeping everything organized and accessible in one secure place.

AS SEEN IN:



Join the forward-thinking organizations offering this essential benefit before it becomes standard.

Phil Hickson, SVP Global Partnerships

Learn More, Visit:



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