



# How to leave a legacy.

An unbelievably simple guide  
for you and your family.





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

Life and legacy planning takes you beyond the obvious issues of finance and insurance, so you can 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 share it with the people who matter most.



Powered by  
everplans

## Welcome to Everplans, Stan

You've been invited to take advantage of a Premium Everplan, courtesy of **Michael Anderson**.

[Activate Your Everplans Account >](#)

Already have an Everplans Account?  
[Log in for your free upgrade >](#)

Not interested?  
[Decline this invitation >](#)

**Michael Anderson**  
CFP®  
Wealth Manager  
Acme Financial



[Send an email](#)  
[\(856\) 903-0765](#)

As Seen In

The New York Times

THE WALL STREET JOURNAL.

AARP

Bloomberg  
TELEVISION

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 share: something you've spent your whole life trying to do.

The difference between wanting to get this planning done and doing it is guidance.

Everplans helps you organize your vital documents and final wishes. It shows you 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 with scanned copies of everything.

Everplans lets you designate "deputies"—friends, family, other beneficiaries or advisors—who have access to all or some of your information. So that even after you're gone, you have control over who sees what.

# Have answers for your family in just 10 minutes.

It seriously is this simple to get started.

Take a 10-minute Q&A, and you'll have a "just in case" letter that summarizes your most important wishes and information. So if something happens to you, your loved ones will know what you want.

It's also a great first step to completing your full plan. Take 10 minutes to visit Everplans.com.

Create a free Just-In-Case Letter like this for your family at [Everplans.com](http://Everplans.com)

**My Just-In-Case Letter**  
Prepared by Yaniv Nord  
December 28, 2015

*Just in case of an emergency, or some other circumstance where we can't be in communication, I have prepared some important information for you. Please store it somewhere safe.*

**Life Insurance**  
I have a life insurance policy from Met Life.  
If questions arise, you should contact the person who helped me with this policy.

Franklin Anderson  
212-678-0932 x. 276  
frank.in@andersonfinancial.com

savings account is also with savings.

deposit box at Well's it box in the freezer.

document specifying what to make healthcare

ctive is in my safe deposit

my healthcare proxy:

afe deposit box.

, Charles Dankowski:

Acme Financial

Welcome, Tony!

**My To-Dos**

Your Checklist

- TO-DO
- DONE

MY LIFE

- About Me
- My Family
- Emergency Contacts
- Homes & Real Estate
- Employment
- Digital World
- Vehicles
- Pets
- Miscellaneous

The best way to start your Everplan is to create a Just-In-Case letter for someone you trust.

It takes about 10 minutes. When you're done you'll have completed a letter that includes emergency contacts, where your Will is stored, Life Insurance policy info, Advance Directive, and much more.

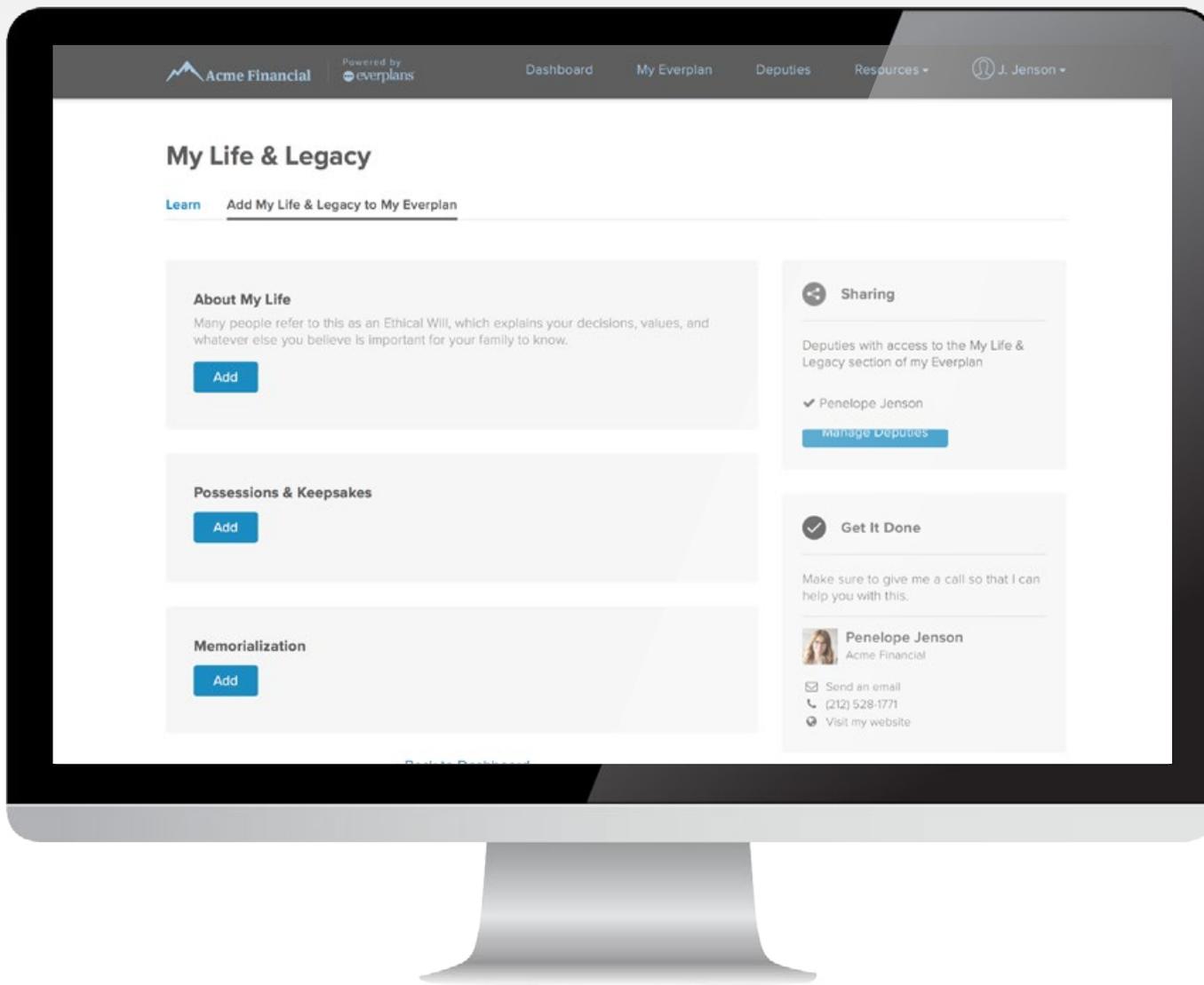
See how it works >

Start my letter >

No thanks, take me to my dashboard

Jump Start Your Everplan  
Create a Just-In-Case Letter for someone you trust.

It only takes 10 minutes to share a handful of the most important bits of information your family might need just-in-case an emergency strikes.

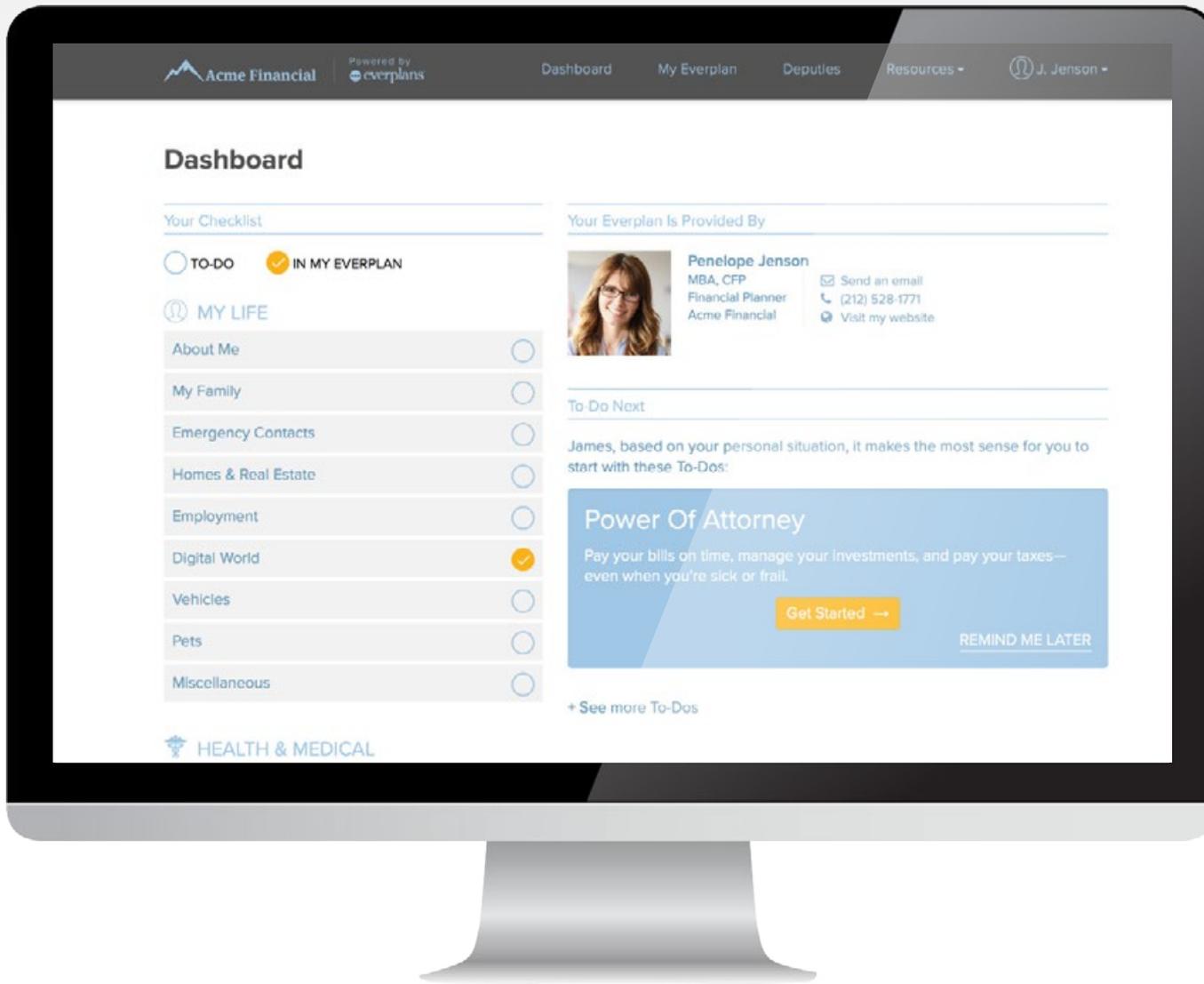


## Getting personal about your life and legacy.

Once you have your just-in-case-letter, it's simple to move into Everplans' Life and Legacy section. 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 to your favorite charity.

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

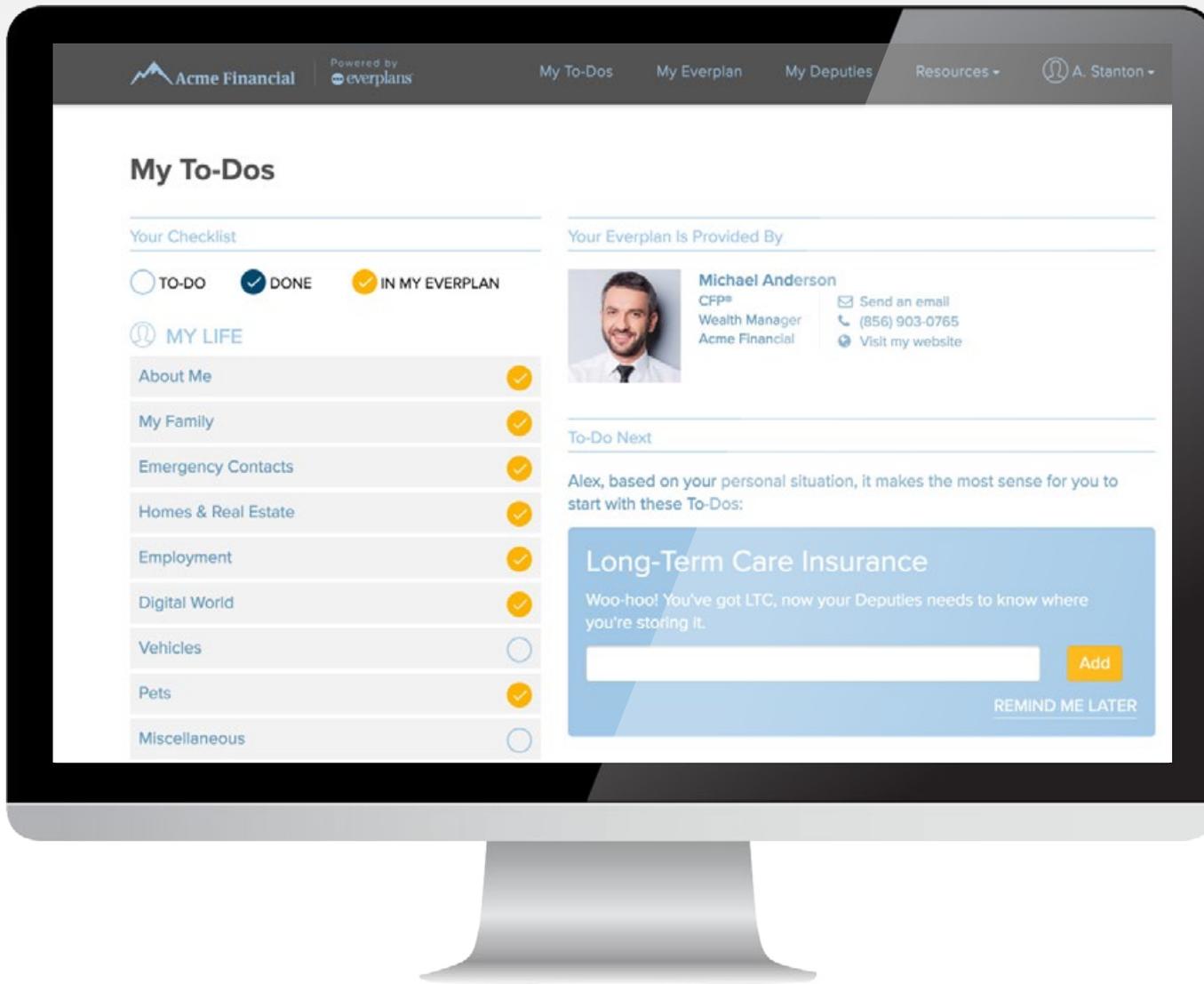


## Leaving your family in comfort, not confusion.

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.

It's up to you. And all you need to include is what you want your loved ones to know.

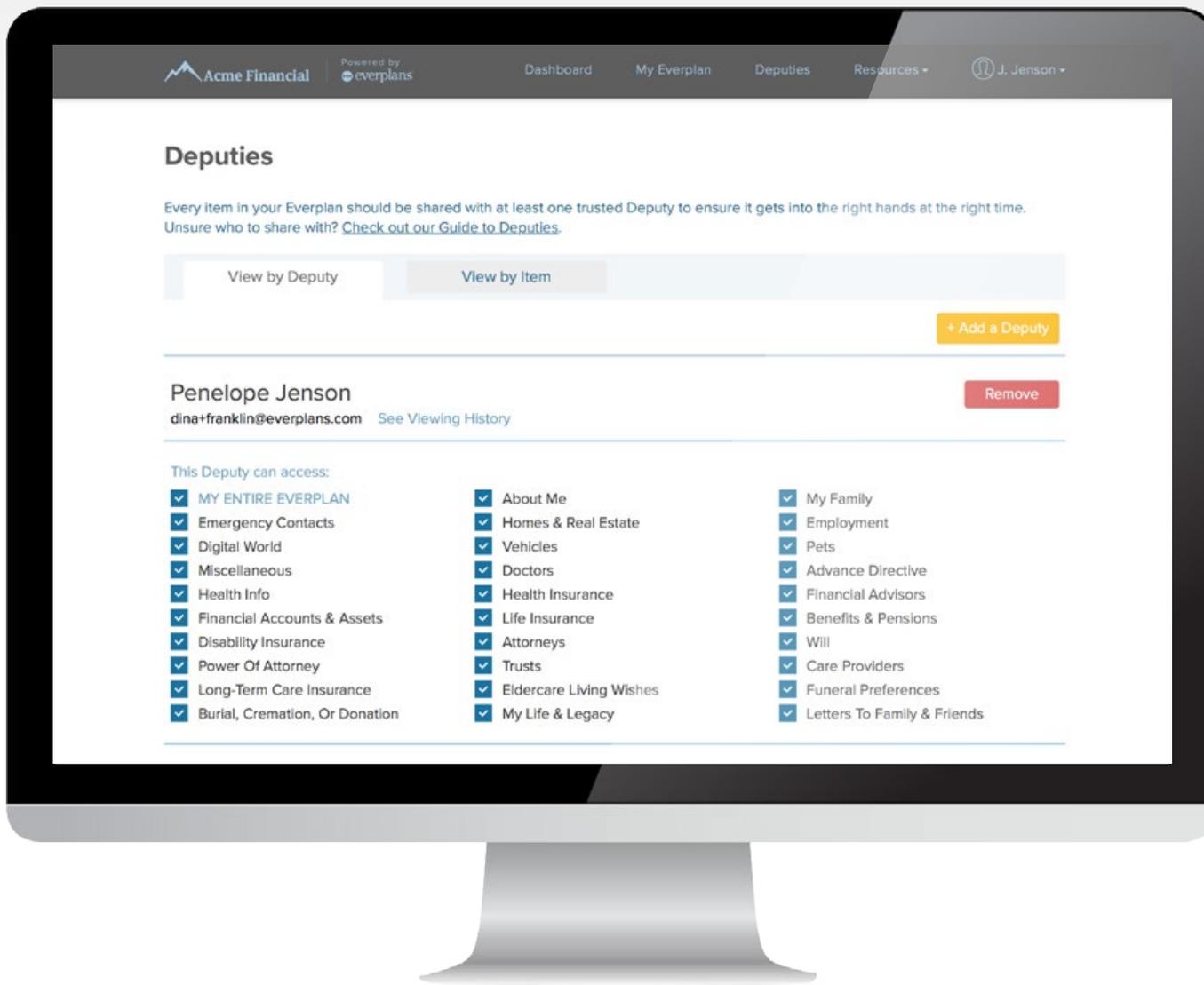


## What to do when.

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 as to any changes you make to 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 share your information, but that isn't what matters most.

With Everplans, your family won't be wasting time running down details. They won't be fighting over what they think you want or where you left the documents.

They'll have everything they need—you will have given it to them—so they can simply celebrate your life and legacy.

 everplans™