Stribling~Whalen
Financial Group

RAYMOND JAMES®

Everplans: Be Prepared for Anything

From time to time, our relationship with a client creates a unique story, and we would love nothing more than to share with you a "case study" to describe outside the box ways we add value for our clients.

Our "Marathon Mission" process takes Family Security to heart. This is why "Family Security Training" has its own section in our process. We offer a tool to clients as part of their financial plan called **Everplans**.

Establishing a legacy is so much more than passing on financial well-being to future generations; it includes health wishes, family information and even your favorite recipe. This life and legacy platform is built to help compile all the details around wills, trusts, doctors and more.

"Sarah" has story we would like to share about her experience with Everplans, and how life's circumstances led her to the many benefits Everplans has provided (Sarah is not this individual's real name).

A couple of years ago Sarah had a serious health scare. In her 70s, Sarah spent 15+ days in the hospital unexpectantly. During this scary moment in her life one of her main thoughts was, "If I get out of here, I have got to get my affairs more organized." While she was unaware of how she would accomplish this, many thoughts were prevalent of how currently no one knew what her last wishes were, where important documents were located, how people would turn off her digital profiles, among many others.

Everplans solves for these thoughts and many more, including the safeguarding of information including:

- Legal Documents – Trusts, Will, Power of Attorney, Attorney's Contact Information
- Health and Medical Records – Health Insurance, Advance Directive, Doctors
- Finances – Financial Accounts and Assets, Advisors, Life Insurance, Tax Returns
- Your Life – Homes & Real Estate (spare keys, garage codes), Vehicles, Digital World, Pets, Family Recipes, Photos
- Legacy Wishes – Burial/Cremation, Funeral Preferences, Letters to Family/Friends

Everplans nudges individuals to think about items many may not have thought of before. Items not only revolving around legal documents or finances, but items that mean much more personally like family recipes, family photos, and family stories behind generational heirlooms.

Dealing with people's most secure and private matters requires an immense amount of security. Two factor authentication is a huge part of this, as well as the many procedures Everplans has in place as a business foundation. The individual personally assigns "delegates" who can view certain information. As an example, the individual can assign their children to view important items like a power of attorney document, advanced healthcare directive and family mementos while they are living. However, it can be restricted where their children can only view the Will after they pass.

A life threating event like a hospital stay often urges people to think about a legacy tool like Everplans. Sarah experienced this moment. Now, she makes it an important tool to visit at least once a year. Each year around tax time Sarah takes the time to upload any new information as well as review who has delegation access to each item. This gives her confidence knowing that everything is in place and in order, but it also adds an incredible value to her heirs, who won't be *thinking* of what she would have wanted. They will **know.**

Taking care of our clients in every aspect is important to us. If you have any questions about Everplans or our Marathon Roadmap Process, please reach out to Stribling~Whalen Financial Group at 678-989-0048 or www.striblingwhalen.com.

Regards,



Warren D. Stribling IV,
CFP®

Brian E. Whalen,
CFP®, CIMA®, AIF®

Jacob Beauchamp,
AAMS®

Disclosure: There is no form of a legal partnership, agency, affiliation, or similar relationship between Everplans and Raymond James, or their affiliates or agents, nor is such a relationship created or implied by the information herein. An introduction to Everplans by Raymond James does not constitute an endorsement, recommendation or opinion as to the appropriateness of any relationship between Raymond James or any financial advisors and Everplans, or their affiliates or agents or any advertising, marketing, social media use, or communications as a result of an introduction to Everplans by a Raymond James financial advisor. Raymond James is independent of Everplans.