Stribling~Whalen
Financial Group

Everplans: Be Prepared for Anything

Our "Marathon Mission" process takes Family Security to heart. This is why "Family Security Training" has its own section in our process. If we have not mentioned it before, as a part of our service offering, we have access to a useful tool called **Everplans**.

This life and legacy platform is built to help compile all the details around wills, trusts, doctors and more. However, establishing your legacy doesn't stop at only the financial material. A legacy means so much more to us including health wishes, family information and even your favorite recipe.

"Sarah" has a 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 a main thought she had 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
- Elder Care Living Preferences – Everplans asks what your wishes are as you age
- 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 involving 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.**

We want you to have confidence regarding your life legacy. Let us know if we can set up an Everplans account for you. We will start the account by uploading any information we currently have available on you, and then we will hand the account over to you and we will not have access to it again. 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®

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620 Spring Street, SE // Gainesville, GA 30501
O 678.989.0048 // F 678.828.5775 // striblingwhalen.com