

# THE ADVISORS GUIDE TO DELIVERING THE BEST ESTATE PLANNING EXPERIENCE





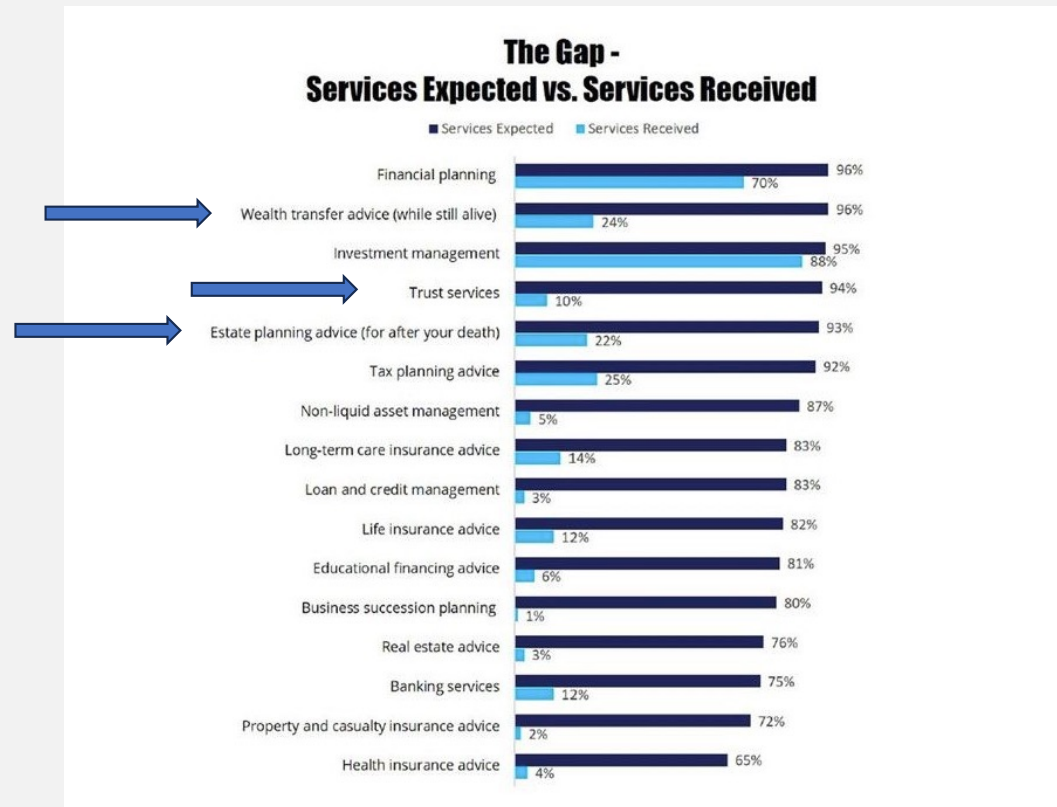
# **THE ESTATE PLANNING CLIENT EXPERIENCE IS BROKEN**

Intimidating + Overwhelming  
+ Expensive  
= Procrastination

# CLIENT EXPECTATIONS

93% of Clients expect estate planning services only 22% of advisors provide it.

2023 T3 Advisor Software Survey  
Advisor adoption of Estate Planning software grew by 44%



\*2022 Spectrem Group Investor Survey

# THE SOLUTION: THE TRUSTED ADVISOR



- ✓ Makes the Complex Easy to Understand
- ✓ Have Had Emotionally Difficult Conversations
- ✓ Already Has My Information and Context
- ✓ Helped Me Complete Complicated Financial Plan
- ✓ Can Save Me Thousands

BUSINESS-TO-CONSUMER



BUSINESS-TO-BUSINESS

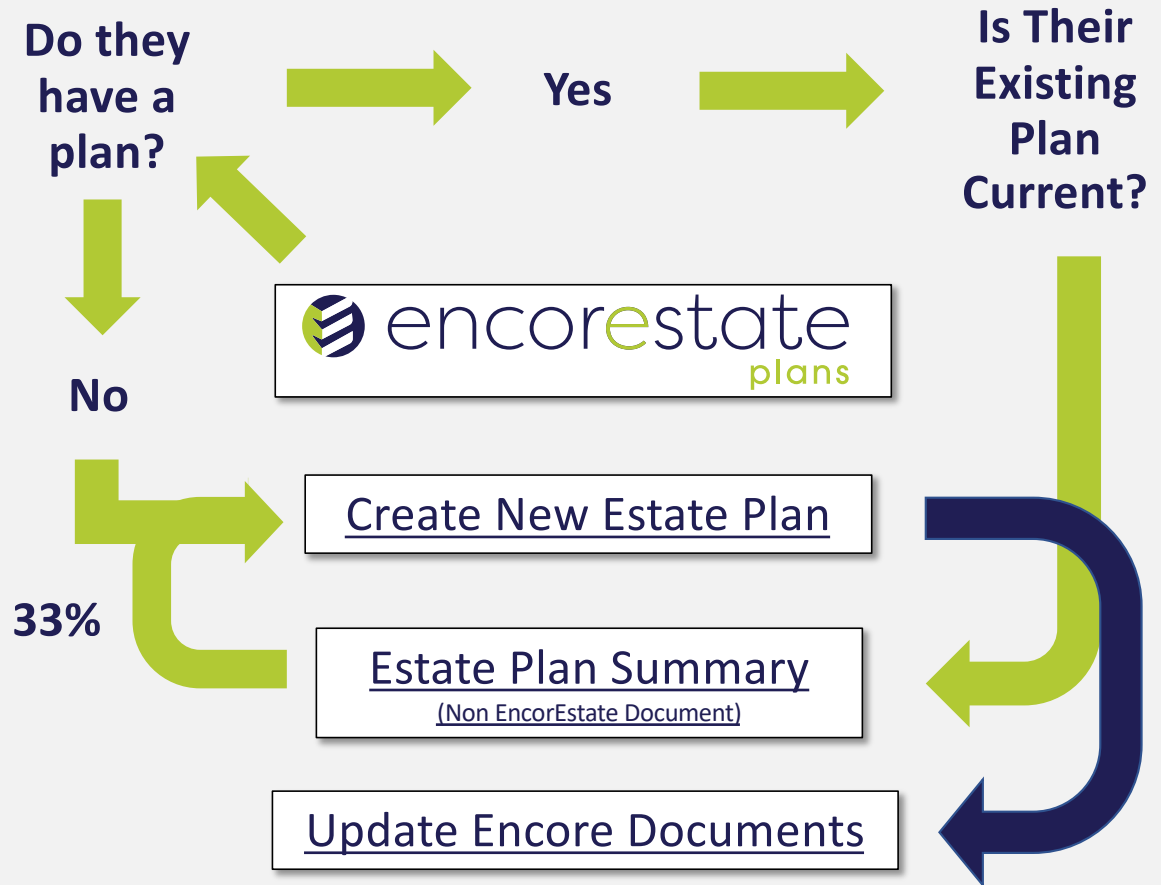


# OUR APPROACH

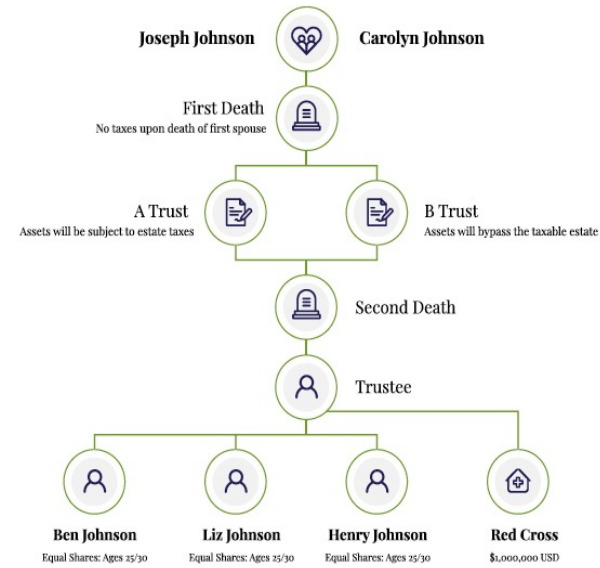
**We empower the trusted advisor to deliver the highest quality estate planning experience available.**

...without practicing law

# Equipping The Advisor For The Estate Planning Life-Cycle



# Visual Estate Plan Summary



Trustees	Guardians	Healthcare Agents (Joseph)	Healthcare Agents (Carolyn)
<b>Kerry Smith</b>	<b>Henry Smith</b>	<b>Edward Chambers</b>	<b>Kathy Richardson</b>
Then	Then	Then	Then
<b>Judy Smith</b>	<b>Thomas Smith</b>	<b>Benedict Chambers</b>	<b>Caitlin Norse</b>
Then	Then	Then	Then
<b>John Smith</b>	<b>Gordon Smith</b>	<b>John Smith</b>	<b>John Smith</b>



# PAY AS YOU GO PRICING

## Existing Estate Plan Summary

**\$150**

Upload your clients existing estate plan and receive a summary of all their previous decisions making up their current trust or will documents. Review with your client and let them confirm whether or not their current plan represents their current desires.

## Trust-based Estate Plan

**\$550**

**What's Included:**

- Certification of trust
- General transfer
- Property agreement for community property states
- Financial Power of Attorney
- Medical Power of Attorney or Advance Health Care Directive
- HIPAA release
- Pour Over Will
- Deed(s) filed for real property (additional charge)

## Will-based Estate Plan

**\$350**

**What's Included:**

- Financial Power of Attorney
- Medical Power of Attorney or Advance Health Care Directive
- HIPAA release

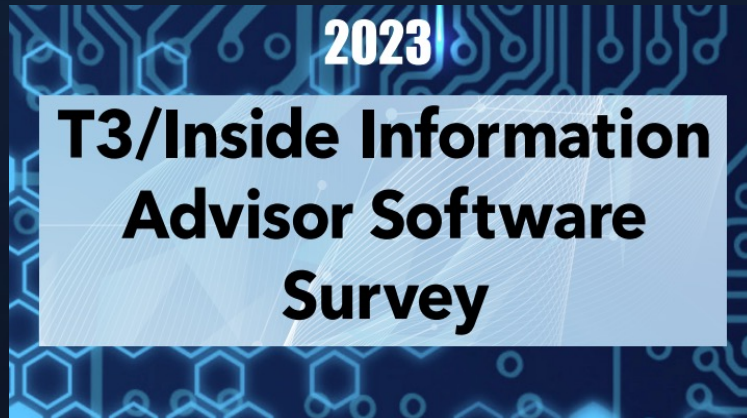
## Estate Plan Update

**\$125**

Annually review plans created by EncorEstate for your clients and easily update when clients decide to make changes in future years. Keep their estate plans current with their desires

**\*CREATE YOUR ACCOUNT AT ENCORESTATEPLANS.COM FOR FREE**

# What Advisors Say



**Highest Rated Customer Satisfaction  
In Estate Planning Categories**

**Create Your Free Account:**  
**[www.encorestateplans.com](http://www.encorestateplans.com)**

**Use Affiliation Code:**  
**encorefppathfinder**

**50% off your 1<sup>st</sup> Will or Trust  
Based Estate Plan**

**Reach out at:**  
**[info@encorestateplans.com](mailto:info@encorestateplans.com)**

