



## Services for Employees

### Survivorship Planning 101

An overview presentation on Survivorship Planning highlighting the key areas of a Survivorship Plan with plenty of stories and examples that will get your audience thinking.

### Survivorship Planning Workshops

#### Boot-Camp Planning

In two, 2-hour sessions, attendees will go through the 5 key areas of a Survivorship Now Plan and learn how to use the materials to create and maintain a custom plan.

##### Session 1

The first session covers the first 3 key areas of a *Survivorship Now Plan – Building Your Contact, Financial Information, Funeral Planning*

The second session usually follows in about a week to give attendees the opportunity to tackle some of the more challenging areas of the plan.

##### Session 2

The second session starts with a Q&A to answer questions about the homework from the first 3 key areas of the plan. The Q&A time is followed by the last 2 key areas of a *Survivorship Now Plan – Contingency Plans and Legal Documents*.

\*\* All materials are included

### Platinum Planning

Survivorship Now works one-on-one with clients to create a comprehensive plan that will be used by executors and families. We research, collect and document the information for each client. Meetings with client will be held at the office of Survivorship Now.

\*\* All materials are included

## **Consulting Services**

Consulting services are available to people who have attended the seminars. Hourly consulting is available by appointment at the office of Survivorship Now.

### **\*\*Materials**

All materials are included in Seminars and Platinum Planning Service. The materials consist of:

- a high quality, pre-formatted notebook complete with samples and an outline for each area
- electronic templates on a CD to use to create a comprehensive plan
- tips for maintaining the plan