The Estate Registry provides a co-branded web portal helping the families of the recently deceased to notify banks, utilities, and other service providers quickly and easily of the passing of a loved one. Instead of having to call to close out accounts, this tool lets executors complete the task in minutes. For advisors, this co-branded resource not only illustrates their ability to recognize and implement new technologies into their practice, but also enables them to set themselves apart during a client's time of need. The Estate Registry offers another way to serve customers while adding additional revenue. I will create a complimentary co-branded Estate Registry link for your review. Please click to view our video.

This is the Instructional Video Notifier Instructional Video Only on Vimeo

InheritNOW provides a non-recourse advance on inheritances without the hassle and frustration of waiting months or years for probate to close. We provide your clients immediate liquidity while reducing family stress and giving them the time for grieving. Click to view video.

LegacyNOW enables advisors to easily and effectively help clients and their family members organize their estate and execute their legacy plan. LegacyNOW is a next generation estate and legacy data management platform with emphasis on creating a digital vault that aggregates, securely stores, and updates on all estate driven data points. This is an advanced estate and legacy planning tool with features specifically designed to fill gaps that have been requested by advisors to help simplify and improve their daily performance. LegacyNow's unique software licensing model promotes a no upfront cost revenue sharing opportunity. This is also a co-branded advisor portal and client digital vault and your company's portal is private labeled so you can provide co-branded vaults.
Vimeo (LegacyNOW instructional video on the client vault with captions no sound)

These services can help cultivate intergenerational relationships and create deeper relationships with family members for generations to come. I would like to demonstrate how easy these services are to provide and how they will positively impact advisor revenue.

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Please, click here to schedule a meeting or demo https://calendly.com/arakovich/zoom-meeting-the-estate-registry

All the best,
Alyssa

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THE ESTATE REGISTRY