

An Inheritance Advance Is Just What Some Clients Need. Now.

What is an Inheritance Advance?

InheritNOW helps people move through the grief of losing a loved one and reduces the added stress of worrying about finances by providing fast and easy inheritance advances. An inheritance advance puts inheritance funds into the hands of beneficiaries almost immediately, eliminating the need to wait for the probate process to complete.

Here’s how: Our experts evaluate the details of a person’s inheritance then offer an advance. If accepted, we send the funds electronically or via overnight check. We take the risk of waiting for the

estate to close and are then compensated directly from the estate based on our mutual agreement. The advance is not a loan, so there are no repayments to be made.

Offering Inheritance Advances to Your Clients

As an advisor, your client relationships are built by being of meaningful service. Helping your clients get their inheritance faster is an opportunity to serve. We can provide your clients immediate liquidity while reducing family stress and giving them space to grieve.



INCREASE YOUR VALUE TO CLIENTS

New Services to Navigate the Estate Process

How your firm benefits

- Provides a new way you can be of service to your clients
- Offers additional revenue opportunity
- Requires no investment on your part

How your clients benefit

- **Fast** - Your client can receive their funds in as little as one day
- **Flexible** - We tell your client how much we can advance, and they choose how much they’d like to receive depending on their needs
- **No hidden fees** - The terms of the advance are simple and agreed on ahead of time

The Estate Registry, a pioneer of estate financial services, provides a digital estate lifecycle management suite to navigate the estate process (LegacyNOW). Alongside tools for executor support (NotifyNOW) and inheritance advances (InheritNOW), management solutions can easily onboard new clients, streamline estate planning operations and enhance communications with clients and their heirs through our highly secure cloud platforms.





Digital Life & Estate Planning Management Platform

LegacyNOW is a digital estate planning and lifecycle management system designed specifically for estate and trust planning and probate attorneys. Our platform provides estate & trust practice groups with an enterprise-grade solution to plan, maintain, and support estate planning within a single, secured cloud environment.

LegacyNOW allows the estate planning professional to engage families multi-generationally within the estate planning process. Financial advisors now have a private-labeled or co-branded

platform that enables communication, collaboration, and coordination amongst their clients' families, executors, trusted service providers, and heirs to streamline and simplify the process of estate lifecycle management.

The solution includes a digital vault that allows clients to house all the important documents that an executor will need. The information is digitally stored and encrypted on the blockchain for secured accessibility with a hash key that is provided to the designated person to access the vault when it's time to manage or resolve the estate.

In addition, LegacyNOW will provide notification and account data of the client's passing to NotifyNOW, which then forwards notification of the deceased account holder immediately to their creditors, utilities, and vendors.

How your firm benefits

- Improves connection and communication with clients and heirs
- Increases insight into client's total financial picture
- Ensures opportunity to convert heirs into new clients
- Provides additional service & fee revenue
- Creates cross-selling opportunities

How your clients benefit

- Reduces client stress by organizing estate matters in a digital vault
- Enables sharing with other service providers and family members
- Saves executor's time notifying creditors

LegacyNOW.com



Assists Executors With Easier Digital Notifications To Creditors

NotifyNOW automates and streamlines the process of securely registering, storing and reporting the passing of a recently deceased account holder to all subscribed creditors, utilities, vendors, etc. Our secure, online platform allows notifiers to enter the decedent's creditor information in one location and upload a death certificate to be sent to creditors on the notifier's behalf. The solution is also directly integrated with LegacyNOW, where the creditor information can also be directly pulled and quickly submitted for immediate notification. Financial Advisors can now have a co-branded portal that can be used as a bereavement tool.

By sharing NotifyNOW with the next of kin of the decedent, your firm builds its reputation as a compassionate care organization.

Our specialists follow each case and work with the notifier and creditor to ensure all steps in the process and compliance with federal and state procedures are completed for each account.

Clients can expect the same level of quality and service from NotifyNOW that they receive from your firm. NotifyNOW reduces the stress and time-consuming financial responsibilities of the executor tasked with the burden of retrieving creditor data.



How your firm benefits

- Reduces repetitive processes
- Co-branded self-service portal
- Streamlines notifications
- Improved service/empathy
- Positive reputational impact

How your clients benefit

- Eliminates multiple creditor contacts
- Reduces cost of multiple death certificates
- Lowers stress during a time of grieving
- Privacy and security
- Risk/Fraud mitigation

NotifyNOW.com