



Your Path to Deeper Relationships & Deposits

Our life planning & succession platform helps you build multi-generational relationships that last

YOUR BANK CAN

Be the **right place** for their plans & family memories.

Deliver peace of mind and be the right place for your customers to secure their plans, businesses, and memories that matters most.

- Easy onboarding for banks & CU's
- Robust planning features
- User-friendly consumer interface



ALL IN ONE PLACE

Life

- Docs & Data
- Estate Details
- Messages & Memories
- Family Collaboration

Business (SMBs)

- Details & Assets
- Vital Docs
- Biz Succession
- Advisor collaboration

Your Bottom Line

Create significant value in weeks - no integrations required.

- New Accounts
- Increased deposits & engagement
- SMB acquisition & retention
- Avg. 300%+ ROI in months

See how fast we can help your bank become the **right place**.

[SCHEDULE A DEMO](#)

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