



# WILL PREP

Designed for Everest by EPOQ Legal

## Did You Know?

**More than 55% of adults do not have a will** and without a will the estate will be distributed according to the law.

To help families avoid this problem, Everest is pleased to announce its newest online planning tool, **Will Prep**.

Everest clients can use Will Prep to access a comprehensive set of online legal documents allowing them to protect themselves, their property and their loved ones. Everest partnered with Epoq Legal to provide a sophisticated online document preparation system designed specifically for Everest clients.

## What's Included?

Will Prep includes essential legal documents such as a Simple Will, Power of Attorney, Health Care Directive and other documents including a Codicil, a Elder Care Agreement and a HIPPA Authorization.

## Who Can Use It?

All new and existing clients in the United States & Canada will have unlimited access to Will Prep allowing them to create legal documents and modify existing documents when needed.

## How Does a Client Get Access?

Will Prep is accessed via the Everest website along with other Everest online planning tools.

### Clients with Online Accounts

“Will Prep” appears as a tab in the header.

### Clients without Online Accounts

An online account must be created using the enrollment code provided in the cover letter of the Everest Welcome Package. If the client cannot locate their Welcome Package, they can call an Everest Advisor for assistance at 1-800-913-8318.

The screenshot shows the Everest website's 'Will Prep' interface. At the top, there's a navigation bar with 'Will Prep' highlighted. Below that, a section titled 'Wills and Estate Documents' contains a brief description of the LawAssure system and a 'Get Started' button. To the right, there's a video player titled 'WHAT IS WILL PREP?' with a 'Play video' button. The page also features a sidebar with 'Available Legal Documents', 'Prepare to Get Started', and 'FAQs for Will Prep'.

## What Makes Everest's Will Prep Different from Other Online Legal Service Providers?

Most online legal services provide you with 'off-the-shelf' or 'flat form' legal documents that will be relatively inflexible to your particular circumstances. Will Prep's LawAssure system asks a series of easy-to-answer questions each with helpful explanations and examples. Based on the responses, the system drafts and tailors the required clauses to create a document unique to a client's situation, while offering a “live preview” to ensure responses are used in the right context.

## How Much Does It Cost?

As with other Everest online planning tools and the 24 X 7 Concierge Service, there are **absolutely no hidden costs** for Will Prep. It's just one more benefit of being an Everest client.