Keep Clients Organized With The New Estate Planning Checklist

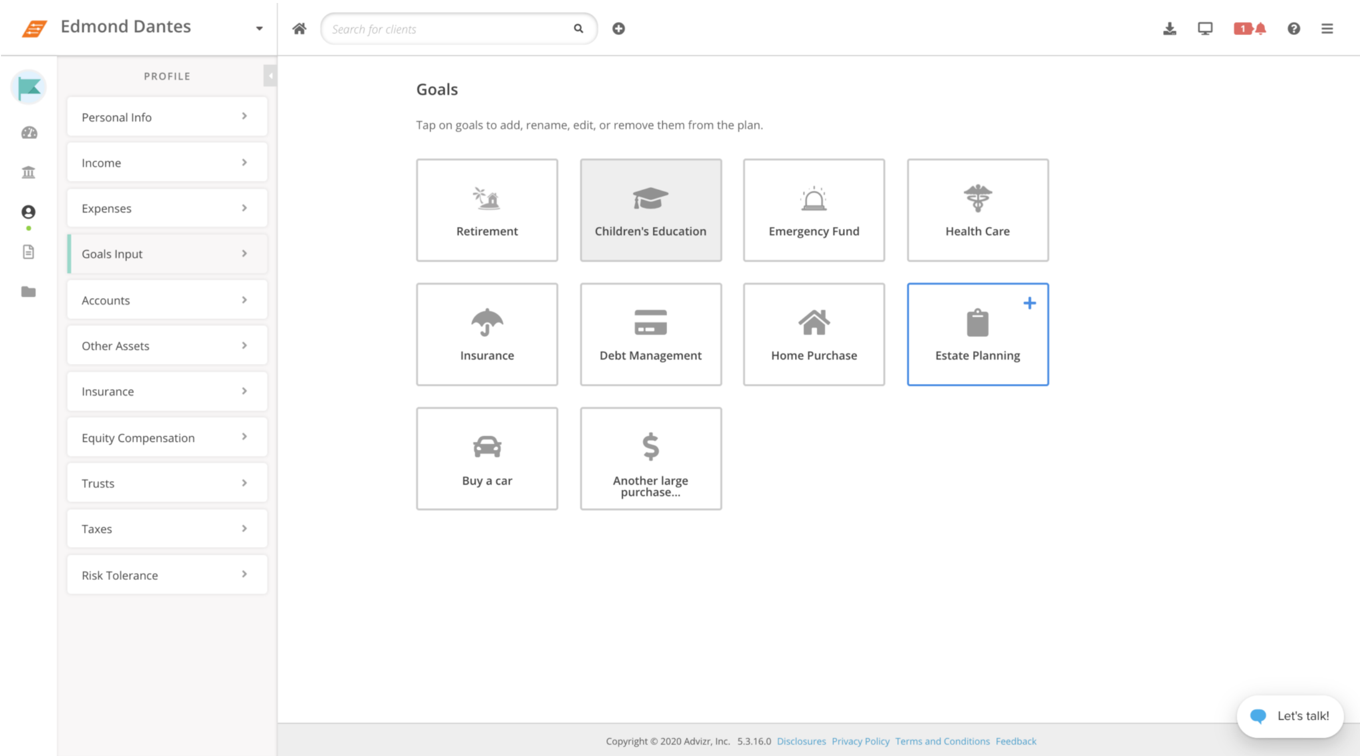
Understanding estate planning needs is an important aspect of every financial plan. Yet while your clients may have all their necessary documents, often those documents are scattered. As your clients' primary advisor, helping organize these documents is a great way to demonstrate the value of your service.

With the release of the new Estate Planning Checklist in Orion Planning (Advizr), we empower you to do just that.

The Estate Planning Checklist enables you and your clients to indicate which estate planning documents they have, upload those documents to their online Vault, and keep a record of when each document was last updated.

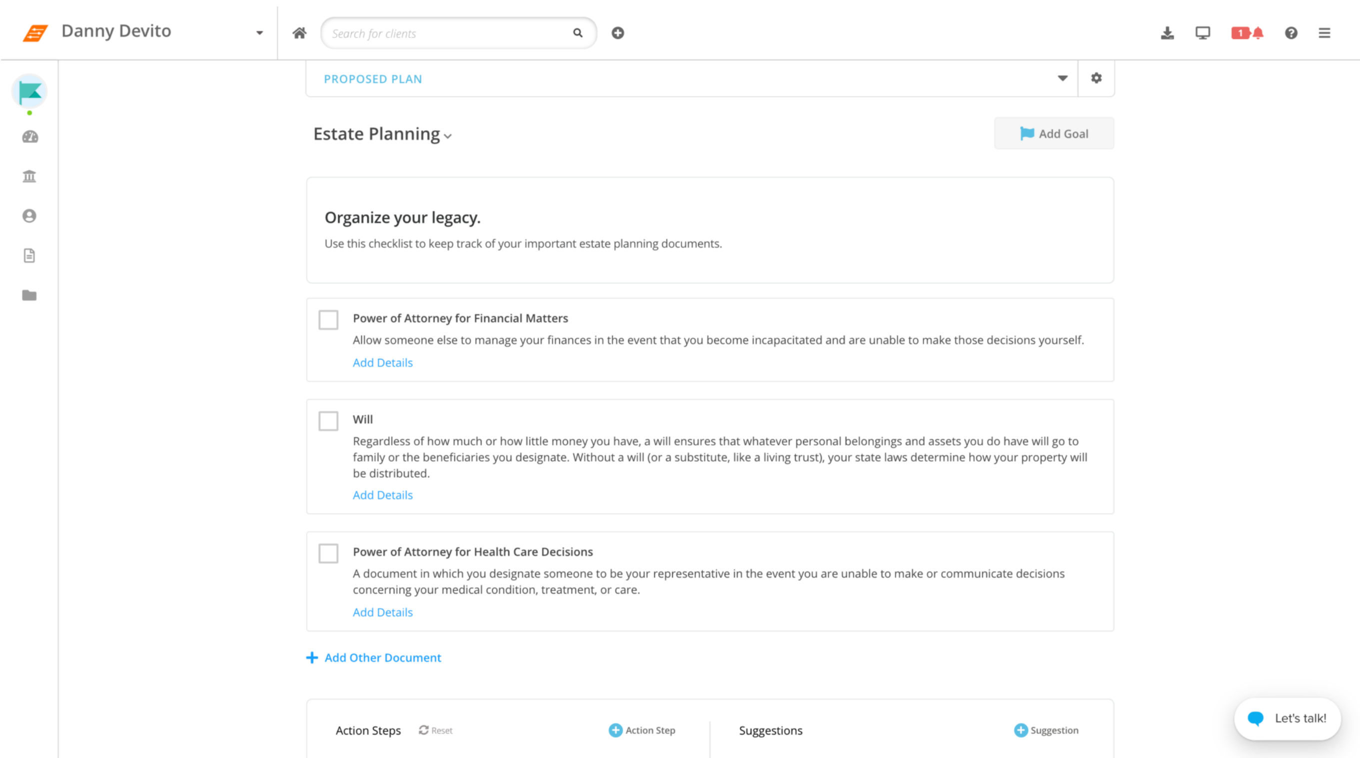
Here is how it works

The Estate Planning Checklist can be found in the Goals section, along with the other key Financial Planning modules.



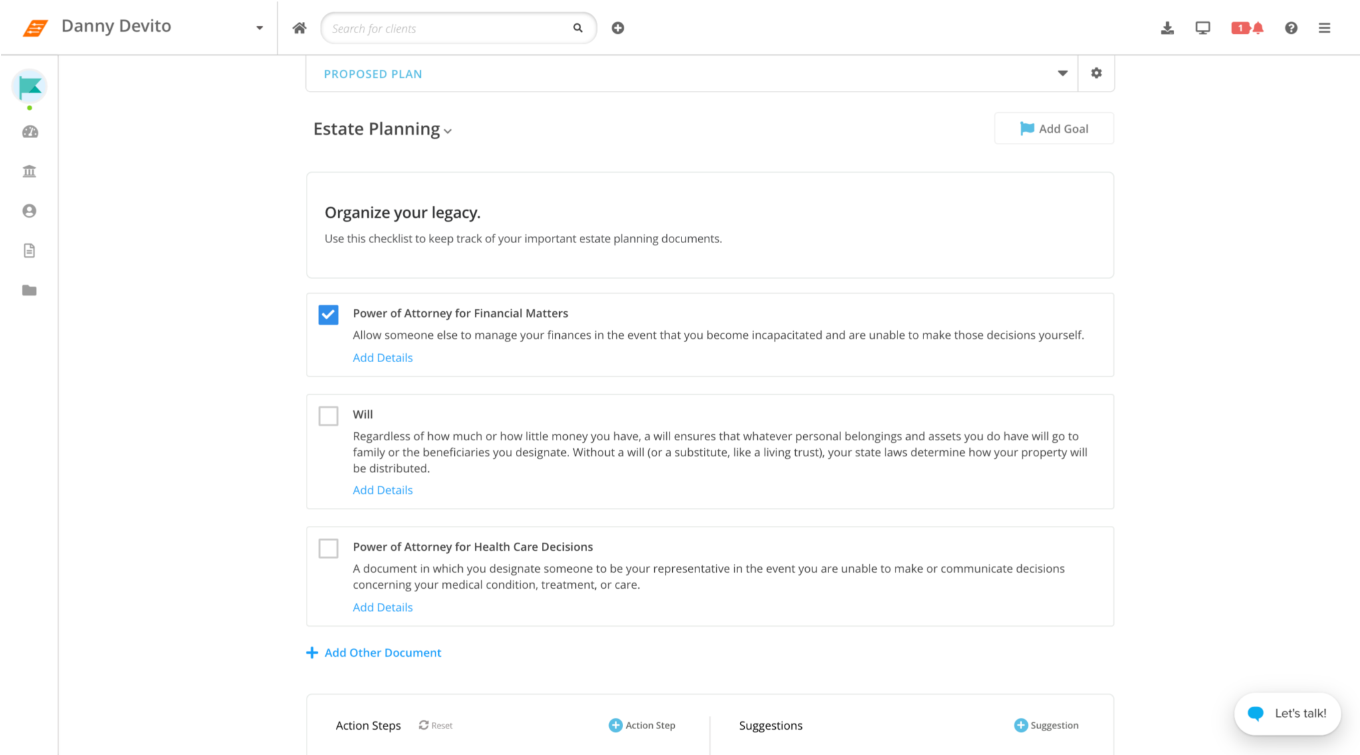
Once in the Estate Planning Checklist module, begin by selecting any number of documents important to the client's estate plan such as their Will or Power of Attorney to be added to the system.

From there, you have the option to customize the title and description and then add the document to the client's secure online Vault. Moving forward, your client will have easy access to those documents at any time.



Staying organized is just as easy as the initial setup. The system keeps note of important details like the date of the last update, so you know when it is time to review documents for accuracy. You can even assign the clients key tasks, like reviewing their Will after five years, that help keep their information up to date.

As time progresses, be sure to continue to update existing documents and add new ones as your clients’ lives grow more complex.



With the new Estate Planning Checklist, you now have the tools to give clients the peace of mind of knowing that all their most important estate documents are organized and accessible.

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