

# How to leave a legacy.

A simple guide for you and your family.

Pets

Financial

Health & Medical

*“My goal is to make it as easy as possible for the person who has to ‘clean up after me’ to get through the necessary notifications. Your idea is visionary. Thank you for doing this.”*

*—Kay from California,  
Everplans user since 2014*



This is bigger than your Will, but as easy as sharing a family recipe.

Life and legacy planning takes you beyond finance and insurance to also focus on the important everyday details you need your loved ones to know.

- Things like account numbers, passwords and usernames.
- Information about cherished items like family photos and secret recipes.
- Details not only about who gets the heirlooms, but *stories* of why those heirlooms matter.

This is what really matters, and this is how you organize, store and securely share it with the people who matter most.



Powered by  
everplans

## Welcome to Everplans, Taylor

You've been invited to take advantage of a Premium Everplan, courtesy of **Robert A. "Rocky" Mills**.

[Activate Your Everplans Account »](#)

Already have an Everplans Account?  
[Log in for your free upgrade »](#)

Not interested?  
[Decline this invitation »](#)

Robert A. "Rocky"  
Mills

MBA, CIMA®  
President  
Westlake Investment  
Advisors

[Send an email](#)  
 (805) 277-7300



The first and most important thing to know is that Everplans is easy.

It's a step-by-step guide through your life and legacy. It walks you through legal, financial, healthcare and personal decisions. And it gets to the heart of your final wishes.

In the end, your loved ones aren't left with questions or concerns.

As Seen In

**The New York Times**

**THE WALL STREET JOURNAL**

**AARP**

**Bloomberg**  
TELEVISION



## Organize, store and securely share: something you've spent your whole life trying to do.

Everplans helps you organize your vital documents and final wishes. It guides you through what to save and gives you a place to save it. It also provides tips, checklists and cheat sheets to make organizing the hard stuff easy.

Everplans offers secure storage so you can safely save all your information in one, convenient place. It's like an electronic safety-deposit box.

Everplans lets you designate "deputies"—friends, family, other beneficiaries or advisors—who have access to all or some of your information. So that even after you're gone, you have control over who sees what.

Invitation to create your personal Everplan

o Robert A. "Rocky" Mills via Everplans <do-not-reply@everplans.com> Feb 8 (1 day ago)

to o me

Add to Salesforce Tracking

Hi, Taylor:

*I know you have taken smart steps to plan for your and your family's future. But a complete plan is about more than trusts, wills and insurance policies. It's about organizing and sharing everything from critical financial information to your final wishes and the passwords for important online accounts.*

*And that's why I'd like to introduce you to Everplans—a simple tool that guides you step-by-step through legal, financial, healthcare and personal decisions, giving you a complete end-of-life plan and ensuring your loved ones aren't left with hassles.*

*I've seen—too many times—what happens when someone passes unprepared: their heirs face delays, frustration, embarrassment and often loss. That's why I think Everplans is such a must.*

*And that's why I'm willing to pay for your use of their platform. And we can help you at any step along the way.*

*It's a journey—you likely won't be able to complete your Everplan in a few minutes. You'll find the questions thought-provoking, and these things take time.*

*But the journey needs to begin. Now!*

Get started:

[Activate your Everplans Account »](#)

Alternatively, the Everplans customer support team can be reached at our [Help Center](#).

## It starts with a simple invitation.

Your financial advisor will get you setup, so it's easy for you to get started.

You'll get a personalized email inviting you to activate your account, and with a one click, you'll be on your way to securing your family's future.

***"I was exceedingly impressed by Everplans. Signup was a breeze—the interface was user-friendly, the explanations were clear, and the whole process only took a few minutes."***

***—Alex from California,  
Everplans user since 2014***

**WESTLAKE**  
Westlake  
Investment  
Advisors

Powered by everplans

**My Life & Legacy**

Add My Life & Legacy to My Everplan   Learn

**About My Life**

Many people refer to this as an Ethical Will, which explains your decisions, values, and whatever else you believe is important for your family to know.

**Add**

**Possessions & Keepsakes**

**Add**

**Cherished Family Memories**

**Add**

**Favorite Charities**

Include all the charities and causes that have meant the most to you throughout your life.

**Add**

**Sharing**

You have not given any Deputies access to the My Life & Legacy section of your Everplan.

**Manage Deputies**

**Get It Done**

Make sure to give me a call so that I can help you with this.

**Robert A. "Rocky" Mills**  
Westlake Investment Advisors

Send an email  
 (805) 277-7300  
 Visit my website

+ Add Robert A. "Rocky" Mills as your Deputy

## Getting personal about your life and legacy.

The Everplans platform is easy to navigate. Just follow the prompts to explain your decisions, express your values and share anything else you want your family to know.

You can also easily add and update details about the possessions that matter most to you and the memories you hold dear. You can talk about whether you want flowers at your funeral or gifts shared with your favorite charity.

It's a way to share and preserve your most important wishes, whatever they may be.

**WESTLAKE**  
FINANCIAL  
ADVISORS

Powered by everplans

**Dashboard**

**MY PLAN** Preview

My Life

- About Me
- My Family
- Emergency Contacts
- Homes & Real Estate
- Employment
- Digital World
- Vehicles
- Pets
- Miscellaneous

Health & Medical

- Financial
- Legal
- Eldercare

After I'm Gone

**Suggested Items To Add:**

**About Me**

Driver's License, Social Security, and Passport. Let your Deputies know where you keep these things.

**Get Started**

**Emergency Contacts**

List the important people in your life who should be contacted in case of an emergency.

**Get Started**

**Financial Accounts & Assets**

Where do you bank? What credit cards do you have? Basic questions like these await you here.

**Get Started**

## Leaving your family in comfort, not confusion.

Taking care of your loved ones means taking care of the medical, legal and financial documents they'll need after you're gone.

Everplans allows you to upload this information—from sources such as your Will or life insurance policy—straight to the site. Or, you can simply leave directions as to where those documents are stored.

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## What to do and when to do it.

You control your plan, and Everplans will be there to help keep things on track.

You'll get to-do lists to make sure you have everything you need, reminders about what might be missing or incomplete, and directions for your next steps.

You won't ever have to worry about where your plan stands, because you'll always have a guide to keep things moving.

## Picking people to be part of your plan.

Your family. Your friends. Your advisors. The people you choose to view your plan—either in part or in total—are entirely up to you.

These “deputies” will see only what you want them to see. So you can leave separate and distinct letters to each of your children. You can give your spouse access to your entire plan. And let your advisor manage the details.

It’s up to you. And Everplans will notify them by email anytime you update your plan.



## You can never have too much security.

Because Everplans deals with people's most private matters, you get the highest levels of security.

But it isn't enough to say it. Everplans proves it:

- Everplans engineers are continually working to enhance and advance system security
- Investments and partnerships with leading financial and insurance institutions provides a solid Everplans foundation
- You can download a PDF of your plan at any time, and in the unlikely event of a fundamental change in the business, you'll be notified in time to get your plan

A large green circular graphic overlays the background. Inside the circle, a silhouette of a man, woman, and two children is flying a kite. A small flock of birds is shown in flight above them. The kite is dark green and has a long tail.

*"In a moment of crisis, the last thing  
a family should be doing is worrying  
or being hassled about paperwork.  
Everplans elegantly solves that problem."*

*—Bill from New York,  
Everplans user since 2014*



**Everplans is a great  
tool, but that's not  
what makes it great.**

It's simple to organize, store and securely share your information, but that isn't what matters most.

With Everplans, your family won't be running down details. They won't be arguing over what they *think* you want or where you left the documents.

They'll have everything they need, so they can simply celebrate your life and legacy.

**Give them this kind of comfort and security.  
Let them know everything is taken care of.  
Start your Everplan now at [Everplans.com](http://Everplans.com).**

